

Part 2B of Form ADV - Brochure Supplement

Richard A. Hillsbery
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This Brochure Supplement provides information about Richard A. Hillsbery, your Investment Advisor Representative. This supplements the SDM Advisors, LLC ("SDMA") Form ADV Part 2A Brochure which you should have also received. The information in these Brochures has not been approved or verified by the United States Securities and Exchange Commission or by any state securities authority. SDM Advisors, LLC is a Registered Investment Adviser. Registration of an Investment Adviser does not imply any level of skill or training. The oral and written communications of an Adviser provide you with information that you may use to determine whether to hire or retain them.

Please contact Richard Hillsbery at (415) 691-4036, or by e-mail rhillsbery@SDMayerWM.com to receive the SDMA Form ADV Part 2A Brochure or if you have any questions about the contents of this Brochure. Additional information about SDMA and Richard Hillsbery is available on the SEC's website at www.adviserinfo.sec.gov and FINRA's website at www.finra.org/brokercheck.

Educational Background and Business Experience

Richard A. Hillsbery

Date of Birth: 1962

Education:

- Excelsior College - B.S. Business Information Systems
- Santa Clara University – Certificate in Advanced Accounting

Examinations and Professional Designations:

- Series 6 – Investment Company Products/Variable Contracts Limited Representative
- Series 63 – Uniform Securities Agent State Law Exam
- Series 65 – Investment Advisors Law Exam
- CPA – Certified Public Accountant
- PFS – Personal Financial Specialist
- CFP® – CERTIFIED FINANCIAL PLANNER™

Business Experience:

- Partner and Investment Advisor Representative – SDM Advisors, LLC. (2013 – present)
- Investment Advisor Representative – ValMark Advisers, Inc. (2012 – present)
- Director of Tax – SD Mayer & Associates, LLP (2012-present)
- Tax and PFS Manager - Burr, Pilger, Mayer, Inc. (2008-2012)
- Registered Representative – ValMark Securities (2007 – present)
- Tax Supervisor, Burr, Pilger, Mayer, LLP (2006-2008)
- Wealth Advisor, Vista Wealth Management, LLC (fka BPM Wealth Management, LLC) (2005-2011)

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CPA – Certified Public Accountant

The CPA designation is offered by the American Institute of Certified Public Accountants® (AICPA®). The requirements to become a CPA include; a) an educational requirement that varies from state to state, but generally consists of 150 credit hours with a predetermined number of accounting credit hours, b) passing all 4 parts of the uniform CPA exam with a 75% or higher (eligibility to sit for exam depends on the state) and, c) 1-2 years of experience under a CPA (varies by state). The AICPA® also requires CPAs to perform continuing professional education, typically 40 hours per year, as well as renewing their licenses every 1, 2 or 3 years.

CFP® – CERTIFIED FINANCIAL PLANNER™

The CFP® designation is offered and recognized by the Certified Financial Planning Board of Standards, Inc. Candidates must have a bachelor's degree (or higher) from an accredited college or university and at least 3 years of full-time personal financial planning experience. Certificant holders must complete a CFP®-board registered program or hold one of the following designations; CPA, ChFC®, CLU®, CFA®, Ph.D. in business or economics, Doctor of Business Administration, or an Attorney's License. Certificants must also successfully pass a 2-day comprehensive examination and complete 30 hours of continuing education credits every 2 years.

PFS – Personal Financial Specialist

The PFS designation is offered and recognized by the American Institute of Certified Public Accountants® (AICPA®). To earn the PFS candidates must a) obtain the CPA license, b) join the AICPA® and becomes a member in good standing, c) complete the comprehensive PFP education, d) attain a specified level of PFP experience, and e) pass a PFP examination.

Disciplinary Information

Registered Investment Advisers are required to disclose material facts regarding any investment related legal or disciplinary events, including issues involving criminal or civil actions, findings resulting from administrative proceeding before the SEC, a self-regulatory body or any other federal or state regulatory authority that would be material to your evaluation of each supervised person providing investment advice.

Richard Hillsbery has no disciplinary record that would impact a client's evaluation of the practice.

Other Business Activities

Rick Hillsbery is an Investment Advisory Representative of ValMark Advisers, Inc., an Investment Advisor registered with the Securities and Exchange Commission. As an investment advisor representative of ValMark Advisers, Rick Hillsbery is eligible to receive advisory fees associated with work performed for customers of that Advisory firm. These fees are separate from fees earned for work with SDM Advisors, LLC.

Richard Hillsbery is a Registered Representative of ValMark Securities, Inc., a broker dealer under common ownership and management of ValMark Advisers, Inc. As a Registered Representative of an affiliated broker dealer, ValMark Securities, Inc. Rick Hillsbery is eligible to receive normal commissions associated with securities sales.

Richard Hillsbery is also an insurance agent affiliated with Executive Insurance Agency, Inc., an agency under common ownership and management of ValMark Advisers, Inc. Richard Hillsbery is also eligible to receive insurance commissions surrounding the sales of insurance products sold through the affiliated insurance agency, Executive Insurance Agency, Inc.

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Richard Hillsbery is also a certified public accountant and employee of SD Mayer & Associates, LLP. Accounting services provided by SD Mayer & Associates, LLP are separate and distinct from the investment advisory services of SDM Advisors, LLC.

Additional Compensation

There is no additional compensation awarded for providing advisory services, such as sales awards, bonuses or prizes.

Supervision

Accounts are reviewed periodically, usually at least annually by the assigned investment advisory representative. Richard Hillsbery is the Firm's Chief Compliance officer. Before accepting and implementing investment strategies recommended, Mr. Hillsbery or a designated supervisory principal will review and approve of the investment strategies. Mr. Hillsbery or a designated supervisory principal also periodically reviews accounts and strategies. These initial and ongoing reviews are under the direction of Mr. Hillsbery who may be reached at (415) 691-4036 to discuss questions or concerns in connection with the internal compliance program.

Requirements for State Registered Advisers

State registered investment advisers are required to disclose the material facts regarding the involvement in certain civil, self-regulatory organization or administrative proceedings, arbitration awards or findings, or bankruptcy proceedings. Mr. Hillsbery has no such information to disclose in relation to this Item.