

**Marc H. Ohler, CFA**

**Excalibur Management Corporation**

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**FORM ADV PART 2B  
BROCHURE SUPPLEMENT**

**This brochure supplement provides information about Marc H. Ohler that supplements the Excalibur Management Corporation brochure. You should have received a copy of that brochure. Please contact Excalibur's Chief Compliance Officer if you did not receive Excalibur Management Corporation's brochure or if you have any questions about the contents of this supplement.**

**Additional information about Marc H. Ohler is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

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## ***Educational Background and Business Experience***

Form ADV Part 2B, Item 2

MARC HAMILTON OHLER

YEAR OF BIRTH: 1972

**EDUCATION:**

DePauw University, Greencastle, IN, B.A., 1994

F.W. Olin Graduate School of Business, Babson College, Wellesley, MA , M.B.A., 2000

**EXAMINATIONS:**

Chartered Financial Analyst, 2001\*\*

NASD Series 7 - 2000

NASD Series 63 - 2000

**BUSINESS BACKGROUND:**

Beginning/Ending Dates

Name & Address of Firm, Type of Business, Exact Nature of Connection or Employment

04/15 - PRESENT

EXCALIBUR MANAGEMENT CORPORATION, Three Newton Executive Park, 2223 Washington Street, Suite 202, Newton, MA 02462-1433; Treasurer, Clerk, Managing Director, Director and Owner of private investment counseling firm.

06/14 – 04/15

EXCALIBUR MANAGEMENT CORPORATION, Three Newton Executive Park, 2223 Washington Street, Suite 202, Newton, MA 02462-1433; Treasurer, Clerk, Managing Director, and Director of private investment counseling firm.

04/13 – 06/14

EXCALIBUR MANAGEMENT CORPORATION, Three Newton Executive Park, 2223 Washington Street, Suite 202, Newton, MA 02462-1433; Managing Director of private investment counseling firm.

02/08 – 04/13

EXCALIBUR MANAGEMENT CORPORATION, 3 Post Office Square, Suite 700, Boston, MA 02109; Managing Director of private investment counseling firm.

04/04 - 02/08

EXCALIBUR MANAGEMENT CORPORATION, 3 Post Office Square, 7th Floor, Boston, MA 02109; Vice President of private investment counseling firm.

06/00 - 03/04

FLEET SECURITIES, INC., 100 Federal Street, 11th Floor, Boston, MA 02110; Senior Associate of mergers and acquisitions advisory firm.

**\*\* Chartered Financial Analyst (“CFA”):** This designation is issued by the CFA Institute and is granted to individuals who meet one of the following prerequisites: possess an undergraduate degree and four years of professional experience investment decision making; or four years qualified work experience (full time, but not necessarily investment related). The candidate is required to follow a self study program involving 250 hours of study for each of the following three disciplines: Level One: Ethics & Professional Standards; Level Two: Investment Tools & Asset Classes; and Level Three: Portfolio Management & Wealth Planning. Once the designation is issued, no further Continuing Education is required.

### ***Disciplinary Information***

Form ADV Part 2B, Item 3

The SEC requires that all supervised persons listed on a firm's ADV Part 2 must disclose all material facts regarding any legal or disciplinary events material to a client's or prospective client's evaluation of the supervised person. No one at Excalibur Management Corporation, including Marc H. Ohler, has ever been the subject of any criminal or civil court action, administrative proceeding by the SEC, or proceeding by a self-regulatory organization. Also, no one at Excalibur, including Mr. Ohler, has ever had any professional degree, designation, or license revoked or suspended.

### ***Other Business Activities***

Form ADV Part 2B, Item 4

The SEC requires all supervised persons listed on a firm's Form ADV Part 2 must disclose all material additional investment-related activities in which they are engaged. Marc H. Ohler works exclusively for Excalibur Management Corporation and therefore has no conflicts of interest with any other financial services firm.

### ***Additional Compensation***

Form ADV Part 2B, Item 5

The SEC requires that all supervised persons listed on a firm's ADV Part 2 must disclose any additional compensation they receive. Marc H. Ohler works exclusively for Excalibur Management Corporation and therefore receives no other compensation.

### ***Supervision***

Form ADV Part 2B, Item 6

Each supervised person is part of team of investment advisors that meets regularly to discuss investment and client related topics. The investment advice of each team member is monitored and shared with other team members on regular basis. Michael W. Delduchetto, President, 617-916-9669 supervises the advisory activity of all Excalibur Management Corporation employees.