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Arlen Irvin Prentice

Kibble & Prentice

601 Union St Ste 1000

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206-441-6300

March 31, 2013

Item 1- Cover Page

This Brochure Supplement provides information about Arlen Prentice that supplements the Kibble & Prentice Brochure. You should have received a copy of that Brochure. Please contact Kibble & Prentice's Chief Compliance Officer, Todd McMahon, at 206.441.6300 or compliance@kpc.com if you did not receive Kibble & Prentice's Brochure or if you have any questions about the contents of this supplement.

Additional information about Arlen Prentice is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2- Educational Background and Business Experience

Arlen Prentice

Year of Birth: 1937

Education: Bachelor of Arts in Education from University of Washington.

Business background:

2009 to Present: Regional Chairman – Kibble & Prentice Holding Company (dba Kibble & Prentice, a USI Company)

2006 to 2009: Regional CEO – Kibble & Prentice Holding Company (dba Kibble & Prentice, a USI Company)

Item 3- Disciplinary Information

Kibble & Prentice is required to disclose all material facts regarding any legal or disciplinary events that would be material a client's evaluation of each supervised person providing investment advice. No information is applicable to this Item.

Item 4- Other Business Activities

Kibble & Prentice is required to disclose any outside business activities or occupation for compensation that could potentially create a conflict of interest with clients. Arlen Prentice is not actively engaged in any such activities.

Item 5- Additional Compensation

Arlen Prentice does not receive economic benefits for providing Advisory services, other than the regular salary paid by Kibble & Prentice.

Item 6 - Supervision

Arlen Prentice is supervised by Todd McMahon, Kibble & Prentice's Chief Compliance Officer, in accordance with the firm's written policies and procedures. Todd reviews all advertising utilized with clients, conducts employee training, and reviews employee activities to ensure compliance. Todd McMahon can be reached at 206.441.6300 or compliance@kpcom.com.

Item 7- Requirements for State-Registered Advisers

Kibble & Prentice is required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. No information is applicable to this Item.

Christopher John Prentice

Kibble & Prentice

601 Union St Ste 1000

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Item 1- Cover Page

This Brochure Supplement provides information about Christopher Prentice that supplements the Kibble & Prentice Brochure. You should have received a copy of that Brochure. Please contact Kibble & Prentice's Chief Compliance Officer, Todd McMahon, at 206.441.6300 or compliance@kpcom.com if you did not receive Kibble & Prentice's Brochure or if you have any questions about the contents of this supplement.

Additional information about Christopher Prentice is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2- Educational Background and Business Experience

Christopher Prentice

Year of Birth: 1968

Education: Bachelor of Arts in History from Hamilton College, attended Oxford University.

Business background:

2009 to Present: Regional CEO – Kibble & Prentice Holding Company (dba Kibble & Prentice, a USI Company)

2006 to 2009: Regional President– Kibble & Prentice Holding Company (dba Kibble & Prentice, a USI Company)

2005 to Present: Investment Adviser Representative – Kibble & Prentice Holding Company (dba Kibble & Prentice, a USI Company)

2002 to Present: Registered Representative and Insurance Agent of Kibble & Prentice's affiliated broker/dealer M Holdings Securities, Inc.

2003 to 2006: Divisional President of Retirement Plan Services, Employee Benefits and Private Client Group – Kibble & Prentice Holding Company

Item 3- Disciplinary Information

Kibble & Prentice is required to disclose all material facts regarding any legal or disciplinary events that would be material a client's evaluation of each supervised person providing investment advice. No information is applicable to this Item.

Item 4- Other Business Activities

Kibble & Prentice is required to disclose any outside business activities or occupation for compensation that could potentially create a conflict of interest with clients. Christopher Prentice is not actively engaged in any such activities.

Item 5- Additional Compensation

Christopher Prentice does not receive economic benefits for providing Advisory services, other than the regular salary paid by Kibble & Prentice.

Item 6 - Supervision

Christopher Prentice is supervised by Todd McMahon, Kibble & Prentice's Chief Compliance Officer, in accordance with the firm's written policies and procedures. Todd reviews all advertising utilized with clients, conducts employee training, and reviews employee activities to ensure compliance. Todd McMahon can be reached at 206.441.6300 or compliance@kpcom.com.

Item 7- Requirements for State-Registered Advisers

Kibble & Prentice is required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. No information is applicable to this Item.

David Francis Ross

Kibble & Prentice

601 Union St Ste 1000

Seattle, WA 98101

206-441-6300

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Item 1- Cover Page

This Brochure Supplement provides information about David Ross that supplements the Kibble & Prentice Brochure. You should have received a copy of that Brochure. Please contact Kibble & Prentice's Chief Compliance Officer, Todd McMahon, at 206.441.6300 or compliance@kpcom.com if you did not receive Kibble & Prentice's Brochure or if you have any questions about the contents of this supplement.

Additional information about David Ross is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2- Educational Background and Business Experience

David Ross

Year of Birth: 1964

Education: Bachelor of Arts in Marketing from Seattle University.

Business background:

2009 to Present: Regional President – Kibble & Prentice Holding Company (dba Kibble & Prentice, a USI Company)

2006 to 2009: Regional Executive Vice President Sales & Operations – Kibble & Prentice Holding Company (dba Kibble & Prentice, a USI Company)

2005 to 2006: Executive Vice President of Employee Benefits and Investment Advisory Groups – Kibble & Prentice Holding Company (dba Kibble & Prentice, a USI Company)

Item 3- Disciplinary Information

Kibble & Prentice is required to disclose all material facts regarding any legal or disciplinary events that would be material a client's evaluation of each supervised person providing investment advice. No information is applicable to this Item.

Item 4- Other Business Activities

Kibble & Prentice is required to disclose any outside business activities or occupation for compensation that could potentially create a conflict of interest with clients. David Ross is not actively engaged in any such activities.

Item 5- Additional Compensation

David Ross does not receive economic benefits for providing Advisory services, other than the regular salary paid by Kibble & Prentice.

Item 6 - Supervision

David Ross is supervised by Todd McMahon, Kibble & Prentice's Chief Compliance Officer, in accordance with the firm's written policies and procedures. Todd reviews all advertising utilized with clients, conducts employee training, and reviews employee activities to ensure compliance. Todd McMahon can be reached at 206.441.6300 or compliance@kpcom.com.

Item 7- Requirements for State-Registered Advisers

Kibble & Prentice is required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. No information is applicable to this Item.

Todd Christian McMahon

Kibble & Prentice

601 Union St Ste 1000

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206-441-6300

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Item 1- Cover Page

This Brochure Supplement provides information about Todd McMahon that supplements the Kibble & Prentice Brochure. You should have received a copy of that Brochure. Please contact Kibble & Prentice's Chief Compliance Officer, Todd McMahon, at 206.441.6300 or compliance@kpcom.com if you did not receive Kibble & Prentice's Brochure or if you have any questions about the contents of this supplement.

Additional information about Todd McMahon is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2- Educational Background and Business Experience

Todd McMahon

Year of Birth: 1966

Education: Bachelor of Science in Accounting from Central Washington University

Business background:

2006 to Present: Regional Chief Compliance Officer, Vice President and Investment Adviser Representative – Kibble & Prentice Holding Company (dba Kibble & Prentice, a USI Company)

2007 to Present: Insurance Agent and Registered Representative of Kibble & Prentice's affiliated broker/dealer M Holdings Securities, Inc.

Item 3- Disciplinary Information

Kibble & Prentice is required to disclose all material facts regarding any legal or disciplinary events that would be material a client's evaluation of each supervised person providing investment advice. No information is applicable to this Item.

Item 4- Other Business Activities

Kibble & Prentice is required to disclose any outside business activities or occupation for compensation that could potentially create a conflict of interest with clients. Todd McMahon is not actively engaged in any such activities.

Item 5- Additional Compensation

Todd McMahon does not receive economic benefits for providing Advisory services, other than the regular salary paid by Kibble & Prentice.

Item 6 - Supervision

Todd McMahon is supervised by Ernest Newborn II, Senior Vice President and General Counsel, as well as the Board of Directions in accordance with the firm's written policies and procedures. Ernest Newborn II can be reached at 914.749.8506 or compliance@kpcom.com.

Item 7- Requirements for State-Registered Advisers

Kibble & Prentice is required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. No information is applicable to this Item.

Holly Christine Beimler

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Item 1- Cover Page

This Brochure Supplement provides information about Holly Beimler that supplements the Kibble & Prentice Brochure. You should have received a copy of that Brochure. Please contact Kibble & Prentice's Chief Compliance Officer, Todd McMahon, at 206.441.6300 or compliance@kpcom.com if you did not receive Kibble & Prentice's Brochure or if you have any questions about the contents of this supplement.

Additional information about Holly Beimler is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2- Educational Background and Business Experience

Holly Beimler

Year of Birth: 1977

Education: Bachelor of Environmental Studies from University of Washington, and Master of Business Administration from University of Washington

Business background:

2009 to Present: Compliance Officer and Registered Investment Adviser– Kibble & Prentice Holding Company (dba Kibble & Prentice, a USI Company)

2008 to 2009: Senior Compliance Analyst – Kibble & Prentice Holding Company (dba Kibble & Prentice, a USI Company)

2005 to 2008: Compliance Coordinator/Senior Compliance Analyst and Registered Investment Adviser – Kibble & Prentice Holding Company (dba Kibble & Prentice, a USI Company)

2003 to Present: Registered Representative and OSJ of Kibble & Prentice's affiliated broker/dealer M Holdings Securities, Inc.

Item 3- Disciplinary Information

Kibble & Prentice is required to disclose all material facts regarding any legal or disciplinary events that would be material a client's evaluation of each supervised person providing investment advice. No information is applicable to this Item.

Item 4- Other Business Activities

Kibble & Prentice is required to disclose any outside business activities or occupation for compensation that could potentially create a conflict of interest with clients. Holly Beimler is not actively engaged in any such activities.

Item 5- Additional Compensation

Holly Beimler does not receive economic benefits for providing Advisory services, other than the regular salary paid by Kibble & Prentice.

Item 6 - Supervision

Holly Beimler is supervised by Todd McMahon, Kibble & Prentice's Chief Compliance Officer, in accordance with the firm's written policies and procedures. Todd reviews all advertising utilized with clients, conducts employee training, and reviews employee activities to ensure compliance. Todd McMahon can be reached at 206.441.6300 or compliance@kpcom.com.

Item 7- Requirements for State-Registered Advisers

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Derek Ashton Crump

Kibble & Prentice

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Item 1- Cover Page

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Additional information about Derek Crump is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2- Educational Background and Business Experience

Derek Crump

Year of Birth: 1974

Education: Bachelor of Arts in Economics and Government from Connecticut College, Master of Science in Economics from the London School of Economics and Political Science

Business background:

2009 to Present: Chief Investment Officer and Investment Adviser Representative – Kibble & Prentice Holding Company (dba Kibble & Prentice, a USI Company)

2003 to 2009: Senior Portfolio Manager and Investment Adviser Representative – Kibble & Prentice Holding Company (dba Kibble & Prentice, a USI Company)

Item 3- Disciplinary Information

Kibble & Prentice is required to disclose all material facts regarding any legal or disciplinary events that would be material a client's evaluation of each supervised person providing investment advice. No information is applicable to this Item.

Item 4- Other Business Activities

Kibble & Prentice is required to disclose any outside business activities or occupation for compensation that could potentially create a conflict of interest with clients. Derek Crump is not actively engaged in any such activities.

Item 5- Additional Compensation

Derek Crump does not receive economic benefits for providing Advisory services, other than the regular salary paid by Kibble & Prentice.

Item 6 - Supervision

Derek Crump is supervised by Todd McMahon, Kibble & Prentice's Chief Compliance Officer, in accordance with the firm's written policies and procedures. Todd reviews all advertising utilized with clients, conducts employee training, and reviews employee activities to ensure compliance. Todd McMahon can be reached at 206.441.6300 or compliance@kpcom.com.

Item 7- Requirements for State-Registered Advisers

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Kory Christiaan Lackey

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206-441-6300

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Item 1- Cover Page

This Brochure Supplement provides information about Kory Lackey that supplements the Kibble & Prentice Brochure. You should have received a copy of that Brochure. Please contact Kibble & Prentice's Chief Compliance Officer, Todd McMahon, at 206.441.6300 or compliance@kpc.com if you did not receive Kibble & Prentice's Brochure or if you have any questions about the contents of this supplement.

Additional information about Kory Lackey is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2- Educational Background and Business Experience

Kory Lackey

Year of Birth: 1979

Education: Bachelor of Arts in Economics from the University of Washington

Business background:

2006 to Present: Portfolio Manager and Investment Adviser Representative – Kibble & Prentice Holding Company (dba Kibble & Prentice, a USI Company)

Item 3- Disciplinary Information

Kibble & Prentice is required to disclose all material facts regarding any legal or disciplinary events that would be material a client's evaluation of each supervised person providing investment advice. No information is applicable to this Item.

Item 4- Other Business Activities

Kibble & Prentice is required to disclose any outside business activities or occupation for compensation that could potentially create a conflict of interest with clients. Kory Lackey is not actively engaged in any such activities.

Item 5- Additional Compensation

Kory Lackey does not receive economic benefits for providing Advisory services, other than the regular salary paid by Kibble & Prentice.

Item 6 - Supervision

Kory Lackey is supervised by Todd McMahon, Kibble & Prentice's Chief Compliance Officer, in accordance with the firm's written policies and procedures. Todd reviews all advertising utilized with clients, conducts employee training, and reviews employee activities to ensure compliance. Todd McMahon can be reached at 206.441.6300 or compliance@kpcom.com.

Item 7- Requirements for State-Registered Advisers

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Keith Ralph Capasso

Kibble & Prentice

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Item 1- Cover Page

This Brochure Supplement provides information about Keith Capasso that supplements the Kibble & Prentice Brochure. You should have received a copy of that Brochure. Please contact Kibble & Prentice's Chief Compliance Officer, Todd McMahon, at 206.441.6300 or compliance@kpcom.com if you did not receive Kibble & Prentice's Brochure or if you have any questions about the contents of this supplement.

Additional information about Keith Capasso is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2- Educational Background and Business Experience

Keith Capasso

Year of Birth: 1978

Education: Bachelors of Arts in Business Administration from College of William & Mary

Business background:

2010 to Present: Investment Adviser Representative – Kibble & Prentice Holding Company (dba Kibble & Prentice, a USI Company)

2007 to 2010: Investment Adviser Representative – RA Bench, Inc.

2004 to 2006: Investment Adviser Representative – Meltzer Wealth Management

Item 3- Disciplinary Information

Kibble & Prentice is required to disclose all material facts regarding any legal or disciplinary events that would be material a client's evaluation of each supervised person providing investment advice. No information is applicable to this Item.

Item 4- Other Business Activities

Kibble & Prentice is required to disclose any outside business activities or occupation for compensation that could potentially create a conflict of interest with clients. Keith Capasso is not actively engaged in any such activities.

Item 5- Additional Compensation

Keith Capasso does not receive economic benefits for providing Advisory services, other than the regular salary paid by Kibble & Prentice.

Item 6 - Supervision

Keith Capasso is supervised by Todd McMahon, Kibble & Prentice's Chief Compliance Officer, in accordance with the firm's written policies and procedures. Todd reviews all advertising utilized with clients, conducts employee training, and reviews employee activities to ensure compliance. Todd McMahon can be reached at 206.441.6300 or compliance@kpcom.com.

Item 7- Requirements for State-Registered Advisers

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Ha Thi-Thanh Nguyen

Kibble & Prentice

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206-441-6300

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Item 1- Cover Page

This Brochure Supplement provides information about Ha Nguyen that supplements the Kibble & Prentice Brochure. You should have received a copy of that Brochure. Please contact Kibble & Prentice's Chief Compliance Officer, Todd McMahon, at 206.441.6300 or compliance@kpcom.com if you did not receive Kibble & Prentice's Brochure or if you have any questions about the contents of this supplement.

Additional information about Ha Nguyen is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2- Educational Background and Business Experience

Ha Nguyen

Year of Birth: 1982

Education: Bachelors of Arts in Business/Finance from the University of Washington

Business background:

2008 to Present: Executive Assistant – Kibble & Prentice Holding Company (dba Kibble & Prentice, a USI Company)

2011 to Present: Investment Adviser Representative – Kibble & Prentice Holding Company (dba Kibble & Prentice, a USI Company)

2004 to 2008: Sales Rep – Verizon Wireless

1999 to 2004: Sales Rep – Circuit City

Item 3- Disciplinary Information

Kibble & Prentice is required to disclose all material facts regarding any legal or disciplinary events that would be material a client's evaluation of each supervised person providing investment advice. No information is applicable to this Item.

Item 4- Other Business Activities

Kibble & Prentice is required to disclose any outside business activities or occupation for compensation that could potentially create a conflict of interest with clients. Ha Nguyen is not actively engaged in any such activities.

Item 5- Additional Compensation

Ha Nguyen does not receive economic benefits for providing Advisory services, other than the regular salary paid by Kibble & Prentice.

Item 6 - Supervision

Ha Nguyen is supervised by Todd McMahon, Kibble & Prentice's Chief Compliance Officer, in accordance with the firm's written policies and procedures. Todd reviews all advertising utilized with clients, conducts employee training, and reviews employee activities to ensure compliance. Todd McMahon can be reached at 206.441.6300 or compliance@kpcom.com.

Item 7- Requirements for State-Registered Advisers

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Matthew Christopher Kane

Kibble & Prentice

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Item 1- Cover Page

This Brochure Supplement provides information about Matthew Kane that supplements the Kibble & Prentice Brochure. You should have received a copy of that Brochure. Please contact Kibble & Prentice's Chief Compliance Officer, Todd McMahon, at 206.441.6300 or compliance@kpcom.com if you did not receive Kibble & Prentice's Brochure or if you have any questions about the contents of this supplement.

Additional information about Matthew Kane is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2- Educational Background and Business Experience

Matthew Kane

Year of Birth: 1977

Education: Bachelor of Arts in American Studies from University of California

Business background:

2005 to Present: Investment Adviser Representative – Kibble & Prentice Holding Company (dba Kibble & Prentice, a USI Company)

Item 3- Disciplinary Information

Kibble & Prentice is required to disclose all material facts regarding any legal or disciplinary events that would be material a client's evaluation of each supervised person providing investment advice. No information is applicable to this Item.

Item 4- Other Business Activities

Kibble & Prentice is required to disclose any outside business activities or occupation for compensation that could potentially create a conflict of interest with clients. Matthew Kane is not actively engaged in any such activities.

Item 5- Additional Compensation

Matthew Kane does not receive economic benefits for providing Advisory services, other than the regular salary paid by Kibble & Prentice.

Item 6 - Supervision

Matthew Kane is supervised by Todd McMahon, Kibble & Prentice's Chief Compliance Officer, in accordance with the firm's written policies and procedures. Todd reviews all advertising utilized with clients, conducts employee training, and reviews employee activities to ensure compliance. Todd McMahon can be reached at 206.441.6300 or compliance@kpcom.com.

Item 7- Requirements for State-Registered Advisers

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Brian Douglas Orton

Kibble & Prentice

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March 31, 2013

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Additional information about Brian Orton is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2- Educational Background and Business Experience

Brian Orton

Year of Birth: 1968

Education: Bachelor of Arts in Accounting from Western Washington University.

Business background:

2003 to Present: Investment Adviser Representative – Kibble & Prentice Holding Company (dba Kibble & Prentice, a USI Company)

Item 3- Disciplinary Information

Kibble & Prentice is required to disclose all material facts regarding any legal or disciplinary events that would be material a client's evaluation of each supervised person providing investment advice. No information is applicable to this Item.

Item 4- Other Business Activities

Kibble & Prentice is required to disclose any outside business activities or occupation for compensation that could potentially create a conflict of interest with clients. Brian Orton is not actively engaged in any such activities.

Item 5- Additional Compensation

Brian Orton does not receive economic benefits for providing Advisory services, other than the regular salary paid by Kibble & Prentice.

Item 6 - Supervision

Brian Orton is supervised by Todd McMahon, Kibble & Prentice's Chief Compliance Officer, in accordance with the firm's written policies and procedures. Todd reviews all advertising utilized with clients, conducts employee training, and reviews employee activities to ensure compliance. Todd McMahon can be reached at 206.441.6300 or compliance@kpcom.com.

Item 7- Requirements for State-Registered Advisers

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Joseph Patrick Strecker

Kibble & Prentice

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206-441-6300

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Item 1- Cover Page

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Additional information about Joseph Strecker is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2- Educational Background and Business Experience

Joseph Strecker

Year of Birth: 1946

Education: Bachelor of Arts in Business Administration from Washington State University.

Business background:

2003 to Present: Investment Adviser Representative – Kibble & Prentice Holding Company (dba Kibble & Prentice, a USI Company)

Item 3- Disciplinary Information

Kibble & Prentice is required to disclose all material facts regarding any legal or disciplinary events that would be material a client's evaluation of each supervised person providing investment advice. No information is applicable to this Item.

Item 4- Other Business Activities

Kibble & Prentice is required to disclose any outside business activities or occupation for compensation that could potentially create a conflict of interest with clients. Joseph Strecker is not actively engaged in any such activities.

Item 5- Additional Compensation

Joseph Strecker does not receive economic benefits for providing Advisory services, other than the regular salary paid by Kibble & Prentice.

Item 6 - Supervision

Joseph Strecker is supervised by Todd McMahon, Kibble & Prentice's Chief Compliance Officer, in accordance with the firm's written policies and procedures. Todd reviews all advertising utilized with clients, conducts employee training, and reviews employee activities to ensure compliance. Todd McMahon can be reached at 206.441.6300 or compliance@kpcom.com.

Item 7- Requirements for State-Registered Advisers

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Rodney Allen Bench

Kibble & Prentice

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March 31, 2013

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This Brochure Supplement provides information about Rodney Bench that supplements the Kibble & Prentice Brochure. You should have received a copy of that Brochure. Please contact Kibble & Prentice's Chief Compliance Officer, Todd McMahon, at 206.441.6300 or compliance@kpc.com if you did not receive Kibble & Prentice's Brochure or if you have any questions about the contents of this supplement.

Additional information about Rodney Bench is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2- Educational Background and Business Experience

Rodney Bench

Year of Birth: 1950

Education: Attended the University of Puget Sound from 1968-1971

Business background:

2010 to Present: Senior Managing Director and Registered Investment Adviser – Kibble & Prentice Holding Company (dba Kibble & Prentice, a USI Company)

2010 to Present: Registered Representative and Insurance Agent of Kibble & Prentice's affiliated broker/dealer, M Holdings Securities, Inc.

1999 to 2010: President and Investment Adviser Representative – RA Bench, Inc.

2002 to 2010: President and Registered Representative – RA Bench Securities, Inc.

Item 3- Disciplinary Information

Kibble & Prentice is required to disclose all material facts regarding any legal or disciplinary events that would be material a client's evaluation of each supervised person providing investment advice. No information is applicable to this Item.

Item 4- Other Business Activities

Kibble & Prentice is required to disclose any outside business activities or occupation for compensation that could potentially create a conflict of interest with clients. Rodney Bench is not actively engaged in any such activities.

Item 5- Additional Compensation

Rodney Bench does not receive economic benefits for providing Advisory services, other than the regular salary paid by Kibble & Prentice.

Item 6 - Supervision

Rodney Bench is supervised by Todd McMahon, Kibble & Prentice's Chief Compliance Officer, in accordance with the firm's written policies and procedures. Todd reviews all advertising utilized with clients, conducts employee training, and reviews employee activities to ensure compliance. Todd McMahon can be reached at 206.441.6300 or compliance@kpcom.com.

Item 7- Requirements for State-Registered Advisers

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Clark Edward Daffern

Kibble & Prentice

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March 31, 2013

Item 1- Cover Page

This Brochure Supplement provides information about Clark Daffern that supplements the Kibble & Prentice Brochure. You should have received a copy of that Brochure. Please contact Kibble & Prentice's Chief Compliance Officer, Todd McMahon, at 206.441.6300 or compliance@kpc.com if you did not receive Kibble & Prentice's Brochure or if you have any questions about the contents of this supplement.

Additional information about Clark Daffern is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2- Educational Background and Business Experience

Clark Daffern

Year of Birth: 1945

Education: Bachelor of Arts in Business Administration from Central Washington University

Business background:

2005 to Present: Investment Adviser Representative – Kibble & Prentice Holding Company (dba Kibble & Prentice, a USI Company)

2005 to Present: Registered Representative and Insurance Agent of Kibble & Prentice's affiliated broker/dealer M Holdings Securities, Inc.

Item 3- Disciplinary Information

Kibble & Prentice is required to disclose all material facts regarding any legal or disciplinary events that would be material a client's evaluation of each supervised person providing investment advice. No information is applicable to this Item.

Item 4- Other Business Activities

Kibble & Prentice is required to disclose any outside business activities or occupation for compensation that could potentially create a conflict of interest with clients. Clark Daffern is not actively engaged in any such activities.

Item 5- Additional Compensation

Clark Daffern does not receive economic benefits for providing Advisory services, other than the regular salary paid by Kibble & Prentice.

Item 6 - Supervision

Clark Daffern is supervised by Todd McMahon, Kibble & Prentice's Chief Compliance Officer, in accordance with the firm's written policies and procedures. Todd reviews all advertising utilized with clients, conducts employee training, and reviews employee activities to ensure compliance. Todd McMahon can be reached at 206.441.6300 or compliance@kpcom.com.

Item 7- Requirements for State-Registered Advisers

Kibble & Prentice is required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. No information is applicable to this Item.

William Ernest Whitaker

Kibble & Prentice

601 Union St Ste 1000
Seattle, WA 98101
206-441-6300
March 31, 2013

Item 1- Cover Page

This Brochure Supplement provides information about William Whitaker that supplements the Kibble & Prentice Brochure. You should have received a copy of that Brochure. Please contact Kibble & Prentice's Chief Compliance Officer, Todd McMahon, at 206.441.6300 or compliance@kpcom.com if you did not receive Kibble & Prentice's Brochure or if you have any questions about the contents of this supplement.

Additional information about William Whitaker is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2- Educational Background and Business Experience

William Whitaker

Year of Birth: 1946

Education: Bachelor of Science in Business Administration from University of Arizona.

Business background:

2005 to Present: Investment Adviser Representative – Kibble & Prentice Holding Company (dba Kibble & Prentice, a USI Company)

2005 to Present: Registered Representative and Insurance Agent of Kibble & Prentice's affiliated broker/dealer M Holdings Securities, Inc

Item 3- Disciplinary Information

Kibble & Prentice is required to disclose all material facts regarding any legal or disciplinary events that would be material a client's evaluation of each supervised person providing investment advice. No information is applicable to this Item.

Item 4- Other Business Activities

Kibble & Prentice is required to disclose any outside business activities or occupation for compensation that could potentially create a conflict of interest with clients. William Whitaker is not actively engaged in any such activities.

Item 5- Additional Compensation

William Whitaker does not receive economic benefits for providing Advisory services, other than the regular salary paid by Kibble & Prentice.

Item 6 - Supervision

William Whitaker is supervised by Todd McMahon, Kibble & Prentice's Chief Compliance Officer, in accordance with the firm's written policies and procedures. Todd reviews all advertising utilized with clients, conducts employee training, and reviews employee activities to ensure compliance. Todd McMahon can be reached at 206.441.6300 or compliance@kpcom.com.

Item 7- Requirements for State-Registered Advisers

Kibble & Prentice is required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. No information is applicable to this Item.

Truong Quoc Tang

Kibble & Prentice

601 Union St Ste 1000

Seattle, WA 98101

206-441-6300

March 31, 2013

Item 1- Cover Page

This Brochure Supplement provides information about Truong Tang that supplements the Kibble & Prentice Brochure. You should have received a copy of that Brochure. Please contact Kibble & Prentice's Chief Compliance Officer, Todd McMahon, at 206.441.6300 or compliance@kpcom.com if you did not receive Kibble & Prentice's Brochure or if you have any questions about the contents of this supplement.

Additional information about Truong Tang is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2- Educational Background and Business Experience

Truong Tang

Year of Birth: 1977

Education: Bachelor of Arts in Economics from Knox College.

Business background:

2001 to Present: Investment Adviser Representative – Kibble & Prentice Holding Company (dba Kibble & Prentice, a USI Company)

2006 to Present: Investment Consultant – Kibble & Prentice Holding Company (dba Kibble & Prentice, a USI Company)

2003 to 2006: Investment Analyst – Kibble & Prentice Holding Company

Item 3- Disciplinary Information

Kibble & Prentice is required to disclose all material facts regarding any legal or disciplinary events that would be material a client's evaluation of each supervised person providing investment advice. No information is applicable to this Item.

Item 4- Other Business Activities

Kibble & Prentice is required to disclose any outside business activities or occupation for compensation that could potentially create a conflict of interest with clients. Truong Tang is not actively engaged in any such activities.

Item 5- Additional Compensation

Truong Tang does not receive economic benefits for providing Advisory services, other than the regular salary paid by Kibble & Prentice.

Item 6 - Supervision

Truong Tang is supervised by Todd McMahon, Kibble & Prentice's Chief Compliance Officer, in accordance with the firm's written policies and procedures. Todd reviews all advertising utilized with clients, conducts employee training, and reviews employee activities to ensure compliance. Todd McMahon can be reached at 206.441.6300 or compliance@kpc.com.

Item 7- Requirements for State-Registered Advisers

Kibble & Prentice is required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. No information is applicable to this Item.

Kent Louis Accola

Kibble & Prentice

601 Union St Ste 1000
Seattle, WA 98101
206-441-6300
March 31, 2013

Item 1- Cover Page

This Brochure Supplement provides information about Kent Accola that supplements the Kibble & Prentice Brochure. You should have received a copy of that Brochure. Please contact Kibble & Prentice's Chief Compliance Officer, Todd McMahon, at 206.441.6300 or compliance@kpcom.com if you did not receive Kibble & Prentice's Brochure or if you have any questions about the contents of this supplement.

Additional information about Kent Accola is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2- Educational Background and Business Experience

Kent Accola

Year of Birth: 1978

Education: Bachelor of Arts in Business/Finance from Western Washington University.

Business background:

2011 to Present: Investment Adviser Representative – Kibble & Prentice Holding Company (dba Kibble & Prentice, a USI Company)

2008 to Present: Investment Operations Analyst – Kibble & Prentice Holding Company (dba Kibble & Prentice, a USI Company)

2004 to 2007: Team Lead in Trading & Reconciliation – Stancorp Financial Group

2001 to 2004: Financial Controls Specialist II – Northern Trust Retirement Consulting

Item 3- Disciplinary Information

Kibble & Prentice is required to disclose all material facts regarding any legal or disciplinary events that would be material a client's evaluation of each supervised person providing investment advice. No information is applicable to this Item.

Item 4- Other Business Activities

Kibble & Prentice is required to disclose any outside business activities or occupation for compensation that could potentially create a conflict of interest with clients. Kent Accola is not actively engaged in any such activities.

Item 5- Additional Compensation

Kent Accola does not receive economic benefits for providing Advisory services, other than the regular salary paid by Kibble & Prentice.

Item 6 - Supervision

Kent Accola is supervised by Todd McMahon, Kibble & Prentice's Chief Compliance Officer, in accordance with the firm's written policies and procedures. Todd reviews all advertising utilized with clients, conducts employee training, and reviews employee activities to ensure compliance. Todd McMahon can be reached at 206.441.6300 or compliance@kpcom.com.

Item 7- Requirements for State-Registered Advisers

Kibble & Prentice is required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. No information is applicable to this Item.

Elsie L Huxtable

Kibble & Prentice

601 Union St Ste 1000
Seattle, WA 98101
206-441-6300
March 31, 2013

Item 1- Cover Page

This Brochure Supplement provides information about Elsie Huxtable that supplements the Kibble & Prentice Brochure. You should have received a copy of that Brochure. Please contact Kibble & Prentice's Chief Compliance Officer, Todd McMahon, at 206.441.6300 or compliance@kpcom.com if you did not receive Kibble & Prentice's Brochure or if you have any questions about the contents of this supplement.

Additional information about Elsie Huxtable is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2- Educational Background and Business Experience

Elsie Huxtable

Year of Birth: 1984

Education: Bachelor of Science in Economics from University of Oregon.

Business background:

2012 to Present: Executive Assistant and Investment Adviser Representative –
Kibble & Prentice Holding Company (dba Kibble & Prentice, a USI Company)
2011 to Present: Executive Assistant – Kibble & Prentice Holding Company (dba
Kibble & Prentice, a USI Company)
2009 to 2011: Executive Assistant with Pacific Properties
2008 to 2009: Administrative Coordinator with Verity Credit Union

Item 3- Disciplinary Information

Kibble & Prentice is required to disclose all material facts regarding any legal or disciplinary events that would be material a client's evaluation of each supervised person providing investment advice. No information is applicable to this Item.

Item 4- Other Business Activities

Kibble & Prentice is required to disclose any outside business activities or occupation for compensation that could potentially create a conflict of interest with clients. Elsie Huxtable is not actively engaged in any such activities.

Item 5- Additional Compensation

Elsie Huxtable does not receive economic benefits for providing Advisory services, other than the regular salary paid by Kibble & Prentice.

Item 6 - Supervision

Elsie Huxtable is supervised by Todd McMahon, Kibble & Prentice's Chief Compliance Officer, in accordance with the firm's written policies and procedures. Todd reviews all advertising utilized with clients, conducts employee training, and reviews employee activities to ensure compliance. Todd McMahon can be reached at 206.441.6300 or compliance@kpcom.com.

Item 7- Requirements for State-Registered Advisers

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Melody Yolanda Prescott

Kibble & Prentice

601 Union St Ste 1000

Seattle, WA 98101

206-441-6300

March 31, 2013

Item 1- Cover Page

This Brochure Supplement provides information about Melody Prescott that supplements the Kibble & Prentice Brochure. You should have received a copy of that Brochure. Please contact Kibble & Prentice's Chief Compliance Officer, Todd McMahon, at 206.441.6300 or compliance@kpcom.com if you did not receive Kibble & Prentice's Brochure or if you have any questions about the contents of this supplement.

Additional information about Melody Prescott is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2- Educational Background and Business Experience

Melody Prescott

Year of Birth: 1969

Education: Attended Washington State University.

Business background:

2009 to Present: Education Specialist – Kibble & Prentice Holding Company (dba Kibble & Prentice, a USI Company)

2009 to Present: Investment Adviser Representative – Kibble & Prentice Holding Company (dba Kibble & Prentice, a USI Company)

2009 to Present: Registered Representative of Kibble & Prentice's affiliated broker/dealer M Holdings Securities, Inc.

2000 to 2009: Participant Communication Consultant – The Standard

Item 3- Disciplinary Information

Kibble & Prentice is required to disclose all material facts regarding any legal or disciplinary events that would be material a client's evaluation of each supervised person providing investment advice. No information is applicable to this Item.

Item 4- Other Business Activities

Kibble & Prentice is required to disclose any outside business activities or occupation for compensation that could potentially create a conflict of interest with clients. Melody Prescott is not actively engaged in any such activities.

Item 5- Additional Compensation

Melody Prescott does not receive economic benefits for providing Advisory services, other than the regular salary paid by Kibble & Prentice.

Item 6 - Supervision

Melody Prescott is supervised by Todd McMahon, Kibble & Prentice's Chief Compliance Officer, in accordance with the firm's written policies and procedures. Todd reviews all advertising utilized with clients, conducts employee training, and reviews employee activities to ensure compliance. Todd McMahon can be reached at 206.441.6300 or compliance@kpcom.com.

Item 7- Requirements for State-Registered Advisers

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Tracy Sue Van Horn

Kibble & Prentice

601 Union St Ste 1000

Seattle, WA 98101

206-441-6300

March 31, 2013

Item 1- Cover Page

This Brochure Supplement provides information about Tracy Van Horn that supplements the Kibble & Prentice Brochure. You should have received a copy of that Brochure. Please contact Kibble & Prentice's Chief Compliance Officer, Todd McMahon, at 206.441.6300 or compliance@kpcom.com if you did not receive Kibble & Prentice's Brochure or if you have any questions about the contents of this supplement.

Additional information about Tracy Van Horn is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2- Educational Background and Business Experience

Tracy Van Horn

Year of Birth: 1962

Education: Bachelor of Arts in Elementary Education from Western Washington University.

Business background:

2006 to Present: Investment Adviser Representative – Kibble & Prentice Holding Company (dba Kibble & Prentice, a USI Company)

2009 to Present: Operations Manager – Kibble & Prentice Holding Company (dba Kibble & Prentice, a USI Company)

2005 to 2009: Education Specialist – Kibble & Prentice Holding Company (dba Kibble & Prentice, a USI Company)

Item 3- Disciplinary Information

Kibble & Prentice is required to disclose all material facts regarding any legal or disciplinary events that would be material a client's evaluation of each supervised person providing investment advice. No information is applicable to this Item.

Item 4- Other Business Activities

Kibble & Prentice is required to disclose any outside business activities or occupation for compensation that could potentially create a conflict of interest with clients. Tracy Van Horn is not actively engaged in any such activities.

Item 5- Additional Compensation

Tracy Van Horn does not receive economic benefits for providing Advisory services, other than the regular salary paid by Kibble & Prentice.

Item 6 - Supervision

Tracy Van Horn is supervised by Todd McMahon, Kibble & Prentice's Chief Compliance Officer, in accordance with the firm's written policies and procedures. Todd reviews all advertising utilized with clients, conducts employee training, and reviews employee activities to ensure compliance. Todd McMahon can be reached at 206.441.6300 or compliance@kpcom.com.

Item 7- Requirements for State-Registered Advisers

Kibble & Prentice is required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. No information is applicable to this Item.

James Mathew Frits

Kibble & Prentice

601 Union St Ste 1000

Seattle, WA 98101

206-441-6300

March 31, 2013

Item 1- Cover Page

This Brochure Supplement provides information about James Frits that supplements the Kibble & Prentice Brochure. You should have received a copy of that Brochure. Please contact Kibble & Prentice's Chief Compliance Officer, Todd McMahon, at 206.441.6300 or compliance@kpcom.com if you did not receive Kibble & Prentice's Brochure or if you have any questions about the contents of this supplement.

Additional information about James Frits is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2- Educational Background and Business Experience

James Frits

Year of Birth: 1967

Education: Bachelor of Arts in Economics and Accounting from Claremont McKenna College, MBA in Finance from University of Oregon

Business background:

2003 to Present: Investment Adviser Representative – Kibble & Prentice Holding Company (dba Kibble & Prentice, a USI Company)

Item 3- Disciplinary Information

Kibble & Prentice is required to disclose all material facts regarding any legal or disciplinary events that would be material a client's evaluation of each supervised person providing investment advice. No information is applicable to this Item.

Item 4- Other Business Activities

Kibble & Prentice is required to disclose any outside business activities or occupation for compensation that could potentially create a conflict of interest with clients. James Frits is not actively engaged in any such activities.

Item 5- Additional Compensation

James Frits does not receive economic benefits for providing Advisory services, other than the regular salary paid by Kibble & Prentice.

Item 6 - Supervision

James Frits is supervised by Todd McMahon, Kibble & Prentice's Chief Compliance Officer, in accordance with the firm's written policies and procedures. Todd reviews all advertising utilized with clients, conducts employee training, and reviews employee activities to ensure compliance. Todd McMahon can be reached at 206.441.6300 or compliance@kpcom.com.

Item 7- Requirements for State-Registered Advisers

Kibble & Prentice is required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. No information is applicable to this Item.

Dallas Lawrence Otter

Kibble & Prentice

601 Union St Ste 1000
Seattle, WA 98101
206-441-6300
March 31, 2013

Item 1- Cover Page

This Brochure Supplement provides information about Dallas Otter that supplements the Kibble & Prentice Brochure. You should have received a copy of that Brochure. Please contact Kibble & Prentice's Chief Compliance Officer, Todd McMahon, at 206.441.6300 or compliance@kpcom.com if you did not receive Kibble & Prentice's Brochure or if you have any questions about the contents of this supplement.

Additional information about Dallas Otter is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2- Educational Background and Business Experience

Dallas Otter

Year of Birth: 1958

Education: Attended Humboldt State College and Bellevue Community College.

Business background:

2003 to Present: Investment Adviser Representative – Kibble & Prentice Holding Company (dba Kibble & Prentice, a USI Company)

2005 to Present: Registered Representative and Insurance Agent of Kibble & Prentice's affiliated broker/dealer M Holdings Securities, Inc

Item 3- Disciplinary Information

Kibble & Prentice is required to disclose all material facts regarding any legal or disciplinary events that would be material a client's evaluation of each supervised person providing investment advice. No information is applicable to this Item.

Item 4- Other Business Activities

Kibble & Prentice is required to disclose any outside business activities or occupation for compensation that could potentially create a conflict of interest with clients. Dallas Otter is not actively engaged in any such activities.

Item 5- Additional Compensation

Dallas Otter does not receive economic benefits for providing Advisory services, other than the regular salary paid by Kibble & Prentice.

Item 6 - Supervision

Dallas Otter is supervised by Todd McMahon, Kibble & Prentice's Chief Compliance Officer, in accordance with the firm's written policies and procedures. Todd reviews all advertising utilized with clients, conducts employee training, and reviews employee activities to ensure compliance. Todd McMahon can be reached at 206.441.6300 or compliance@kpcom.com.

Item 7- Requirements for State-Registered Advisers

Kibble & Prentice is required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. No information is applicable to this Item.

Kyle Jay Russell

Kibble & Prentice

601 Union St Ste 1000
Seattle, WA 98101
206-441-6300
March 31, 2013

Item 1- Cover Page

This Brochure Supplement provides information about Kyle Russell that supplements the Kibble & Prentice Brochure. You should have received a copy of that Brochure. Please contact Kibble & Prentice's Chief Compliance Officer, Todd McMahon, at 206.441.6300 or compliance@kpcom.com if you did not receive Kibble & Prentice's Brochure or if you have any questions about the contents of this supplement.

Additional information about Kyle Russell is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2- Educational Background and Business Experience

Kyle Russell

Year of Birth: 1970

Education: Associate of Arts from Highline Community College.

Business background:

2004 to Present: Investment Adviser Representative – Kibble & Prentice Holding Company (dba Kibble & Prentice, a USI Company)

2005 to Present: Registered Representative and Insurance Agent of Kibble & Prentice's affiliated broker/dealer M Holdings Securities, Inc

Item 3- Disciplinary Information

Kibble & Prentice is required to disclose all material facts regarding any legal or disciplinary events that would be material a client's evaluation of each supervised person providing investment advice. No information is applicable to this Item.

Item 4- Other Business Activities

Kibble & Prentice is required to disclose any outside business activities or occupation for compensation that could potentially create a conflict of interest with clients. Kyle Russell is not actively engaged in any such activities.

Item 5- Additional Compensation

Kyle Russell does not receive economic benefits for providing Advisory services, other than the regular salary paid by Kibble & Prentice.

Item 6 - Supervision

Kyle Russell is supervised by Todd McMahon, Kibble & Prentice's Chief Compliance Officer, in accordance with the firm's written policies and procedures. Todd reviews all advertising utilized with clients, conducts employee training, and reviews employee activities to ensure compliance. Todd McMahon can be reached at 206.441.6300 or compliance@kpcom.com.

Item 7- Requirements for State-Registered Advisers

Kibble & Prentice is required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. No information is applicable to this Item.

Michael Thomas van der Velden

Kibble & Prentice

601 Union St Ste 1000
Seattle, WA 98101
206-441-6300
March 31, 2013

Item 1- Cover Page

This Brochure Supplement provides information about Michael van der Velden that supplements the Kibble & Prentice Brochure. You should have received a copy of that Brochure. Please contact Kibble & Prentice's Chief Compliance Officer, Todd McMahon, at 206.441.6300 or compliance@kpc.com if you did not receive Kibble & Prentice's Brochure or if you have any questions about the contents of this supplement.

Additional information about Michael van der Velden is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2- Educational Background and Business Experience

Michael van der Velden

Year of Birth: 1964

Education: Bachelor of Arts in Finance and Economics from University of Notre Dame.

Business background:

2003 to Present: Investment Adviser Representative – Kibble & Prentice Holding Company (dba Kibble & Prentice, a USI Company)

2006 to Present: Registered Representative and Insurance Agent of Kibble & Prentice's affiliated broker/dealer M Holdings Securities, Inc

Item 3- Disciplinary Information

Kibble & Prentice is required to disclose all material facts regarding any legal or disciplinary events that would be material a client's evaluation of each supervised person providing investment advice. No information is applicable to this Item.

Item 4- Other Business Activities

Kibble & Prentice is required to disclose any outside business activities or occupation for compensation that could potentially create a conflict of interest with clients. Michael van der Velden is not actively engaged in any such activities.

Item 5- Additional Compensation

Michael van der Velden does not receive economic benefits for providing Advisory services, other than the regular salary paid by Kibble & Prentice.

Item 6 - Supervision

Michael van der Velden is supervised by Todd McMahon, Kibble & Prentice's Chief Compliance Officer, in accordance with the firm's written policies and procedures. Todd reviews all advertising utilized with clients, conducts employee training, and reviews employee activities to ensure compliance. Todd McMahon can be reached at 206.441.6300 or compliance@kpcom.com.

Item 7- Requirements for State-Registered Advisers

Kibble & Prentice is required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. No information is applicable to this Item.

Professional Certifications

Employees of Kibble & Prentice have earned the following certifications and accreditations. It is required that these accreditations be explained in further details.

ACCREDITED ASSET MANAGEMENT SPECIALISTSM

ACCREDITED ASSET MANAGEMENT SPECIALISTSM and AAMS[®] are federally registered professional certification marks awarded by The College for Financial Planning[®]. An Accredited Asset Management SpecialistSM certificant is a professional who is committed to competent and ethical behavior. To attain the right to use the AAMS[®] marks, an individual must satisfactorily fulfill the following requirements:

- Education – Complete a course of study addressing asset management that The College of Financial Planning have determined are necessary for asset managers
- Examination – Pass the College for Financial Planning's examination, which includes practical knowledge questions over a topics stemming from the Asset Management Process to Estate Planning and Regulatory issues
- Ethics – Agree to comply with the Code of Ethics, which includes agreeing to abide by the Standards of Professional Conduct and Terms and Conditions
- Continuing Education – Complete 16 hours of continuing education every two years

To learn more about the AAMS[®] designation, visit www.cffp.edu.

ACCREDITED INVESTMENT FIDUCIARY[®]

ACCREDITED INVESTMENT FIDUCIARY[®] and AIF[®] are federally-registered professional certification marks granted by the Center for Fiduciary Studies, LLC, a Fiduciary360 (fi306) company. An Accredited Investment Fiduciary certificant must demonstrate specialized knowledge of fiduciary standards of care in the investment management process. To attain the right to use the AIF[®] marks, an individual must satisfactorily fulfill the following requirements:

- Education – Complete a course of study addressing prudent practices for investment fiduciaries
- Examination – Pass the comprehensive, closed-book examination, which includes practical knowledge questions over a variety of topics related to fiduciary rules
- Ethics – Agree to comply with the AIF[®] Code of Ethics, which is annually renewed
- Continuing Education – Complete 6 hours of continuing education annually

To learn more about the AIF[®] designation, visit www.fi360.com.

ACCREDITED WEALTH MANAGEMENT ADVISOR[®]

ACCREDITED WEALTH MANAGEMENT ADVISOR[®] and AWMA[®] are federally-registered professional certification marks granted by the College for Financial Planning. An

Accredited Wealth Management Advisor certificant must complete a course of study encompassing wealth strategies, equity-based compensation plans, tax reduction alternatives and asset protection alternatives. An individual must satisfactorily fulfill the following requirements:

- Education – Complete a course of study addressing wealth management strategies
- Examination – Pass a comprehensive end-of-course examination that tests abilities to synthesize complex concepts and apply to real-life situations.
- Ethics – Agree to comply with the College for Financial Planning Standards of Professional Conduct.
- Continuing Education – Complete 16 hours of continuing education biannually

To learn more about the AWMA® designation, visit www.cffp.edu.

CHARTERED FINANCIAL ANALYST

CHARTERED FINANCIAL ANALYST and CFA are internationally recognized professional certification marks granted by the CFA Institute. A Chartered Financial Analyst charter holder must demonstrate in depth knowledge of investment valuation, portfolio management, industry and company analysis and ethics studied over 2.5 to 3 years. To attain the right to use the CFA marks, an individual must satisfactorily fulfill the following requirements:

- Education – Intensive self-study guided by subject matter over a large spectrum of knowledge considered equivalent to a masters degree in many countries, and a Bachelor's Degree or equivalent is required
- Experience – A minimum of four years of relevant work experience is required
- Examination – Pass three levels of exams offered annually that consist of six hours of intensive closed book knowledge encompassing 240 multiple choice questions and 20 case studies
- Ethics – Agree to comply with the CFA Code of Ethics, which is annually renewed, and follow the Professional Code of Conduct

To learn more about the CFA charter, visit www.cfainstitute.org.

CERTIFIED FINANCIAL PLANNER™

CERTIFIED FINANCIAL PLANNER™ and CFP® are federally registered CFP® professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). A Certified Financial Planner™ certificant is a professional who is committed to competent and ethical behavior when providing financial planning advice. To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- Education – Complete an advanced college-level course of study addressing the financial planning subject areas that the CFP Board's studies have determined as necessary for the competent and professional delivery of financial planning services,

and attain a Bachelor's Degree from a regionally accredited United States college or university (or its equivalent from a foreign university)

- Examination – Pass the CFP® Certification Examination. The examination includes case studies and client scenarios designed to test one's ability to correctly diagnose financial planning issues and apply one's knowledge of financial planning to real world circumstances
- Experience – A minimum of three years of full-time financial planning-related experience is required
- Ethics – Agree to be bound by CFP Board's Standards of Professional Conduct, a set of documents outlining the ethical and practice standards for CFP® professionals
- Continuing Education – Complete 30 hours of continuing education hours every two years, including two hours on the Code of Ethics and other parts of the Standards of Professional Conduct

To learn more about the CFP® designation, visit www.cfp.net.

CERTIFIED FUND SPECIALIST®

CERTIFIED FUND SPECIALIST® and CFS® are federally registered professional certification marks granted by the Institute of Business & Finance (IBF). A Certified Fund Specialist® certificant is a professional who is trained to understand evaluated and compare financial measurements and benchmarks when constructing a portfolio. To attain the right to use the CFS® marks, an individual must satisfactorily fulfill the following requirements:

- Education – Complete a 60-hour course detailing the modern portfolio theory and spanning the breadth of fund types to understand how to develop a suitable and efficient portfolio
- Examination – Pass the comprehensive exam
- Ethics – Agree to be bound by IBF's Code of Ethics
- Continuing Education – Complete 15 hours of continuing education hours annually

To learn more about the CFS® designation, visit www.icfs.com

CHARTERED LIFE UNDERWRITER®

CHARTERED LIFE UNDERWRITER® and CLU® are federally registered professional certification marks granted by the Huebner School. A Chartered Life Underwriter® certificant is a professional who is trained evaluate different types of insurance to understand all aspects of insurance planning, estate and retirement issues, business insurance and risk management. To attain the right to use the CLU® marks, an individual must satisfactorily fulfill the following requirements:

- Education – The course represents eight or more comprehensive college-level courses covering all aspects of insurance planning generally completed in a self-study program over 400 hours
- Examination – Pass the comprehensive exam
- Experience – Three years of full-time business experience is required

- Ethics – Agree to be bound by the Huebner School Code of Ethics
- Continuing Education – Complete 30 hours of continuing education hours every two years

To learn more about the CLU® designation, visit www.theamericancollege.edu.

CERTIFIED PUBLIC ACCOUNTANT (CPA)

Certified Public Accountant (CPA) is the statutory title of qualified accountants in the United States who have passed the Uniform Certified Public Accountant Examination and have met additional education and experience requirements as determined by the state of residency. The primary functions CPA's fulfill relate to assurance services, or public accounting. In assurance services, also known as financial audit services, CPAs attest to the reasonableness of disclosures, the freedom from material misstatement, and the adherence to the applicable generally accepted accounting principles (GAAP) in financial statements. CPAs can also be employed by corporations—termed "the private sector"—in finance functions such as Chief Financial Officer (CFO) or finance manager, or as CEOs subject to their full business knowledge and practice. CPAs can operate in virtually any area of finance including income tax preparation and planning, financial accounting, financial analysis, forensic accounting, financial planning, management consulting and corporate governance. A CPA must satisfy the following requirements:

- Education – The necessary education credentials in Washington State are at least 150 semester credits of college education including a baccalaureate degree or higher, 24 semester credits in accounting subjects with 15 credits at the graduate level and 24 semester credits in business administration subjects
- Examination – Candidates must pass the Uniform Certified Public Accountant Examination. The exam tests general principles of auditing, financial statement preparation and presentation, business law and federal tax laws. Although the CPA exam is uniform, licensing and certification requirements are set by each state's laws and therefore vary from state to state
- Experience – Experience requirements for Washington State are a minimum of 12 months consisting of at least 2000 hours obtained within eight years prior to application for licensure
- Ethics – Ethics requirements in Washington state require applicants for CPA status to complete a special examination on ethics
- Continuing Education – Continuing education for Washington State licensed CPAs require a total of 120 CPE hours per three year period

To learn more about the CPA designation, visit www.cpa.org.

INVESTMENT ADVISER CERTIFIED COMPLIANCE PROFESSIONAL (IACCP)

The Investment Adviser Association cosponsors the National Regulatory Services's Investment Adviser Compliance Certificate Program. This programs leads to a professional

designation of Investment Adviser Certified Compliance Professional (IACCP). The program was established and designed to advance investment adviser compliance as a profession. To attain the right to use the IACCP marks, an individual must satisfactorily fulfill the following requirements:

- Education – Complete an advanced college-level course of study addressing regulatory compliance and ethics over 40 hours of class time
- Examination – Pass the IACCP Certification Examination
- Experience – A minimum of two years of full-time work experience is required
- Ethics – Agree to be bound by National Regulator Services's Code of Ethics
- Continuing Education – Complete 12 hours of continuing education hours annually

To learn more about the IACCP designation, visit www.nrs-education.com.

LIFE UNDERWRITER TRAINING COUNCIL FELLOW®

LIFE UNDERWRITER TRAINING COUNCIL FELLOW® and LUTCF® are federally registered professional certification marks granted by the Huebner School. A Life Underwriter Training Council Fellow® certificant is a professional who is trained to combine essential product knowledge with basic planning concepts. To attain the right to use the LUTCF® marks, an individual must satisfactorily fulfill the following requirements:

- Education – The course represents six or more comprehensive college-level courses covering all aspects of insurance planning generally completed in a self-study program earning at least 300 designation credits
- Examination – Pass the comprehensive exam
- Ethics – Agree to be bound by the Huebner School Code of Ethics

To learn more about the LUTCF® designation, visit www.theamericancollege.edu.