

**Item 1: Cover Page**  
**Part 2B of Form ADV: Brochure Supplement**  
**May 2017**

**David G. Geddes**

**Snider Financial Group**

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**Bellevue, Washington 98005**  
**[www.SniderFinancialGroup.com](http://www.SniderFinancialGroup.com)**

**Firm Contact:**  
**Monte Snider**  
**Chief Compliance Officer**

This brochure supplement provides information about David Geddes that supplements our brochure. You should have received a copy of that brochure. Please contact Monte Snider if you did not receive Snider Retirement Strategies, Inc. dba Snider Financial Group's brochure or if you have any questions about the contents of this supplement. Additional information about David Geddes is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching CRD #4554566.

## Item 2: Educational Background & Business Experience

**David Grant Geddes**

**Year of Birth:** 1955

### **Educational Background:**

- 1981: Brigham Young University; Master of Accountancy (MAcc)

### **Business Background:**

- 02/2009 – Present Snider Financial Group; Investment Adviser Representative
- 08/1994 – Present Geddes Chucka, PLLC; Partner
- 02/2009 – 04/2010 LPL Financial, LLC; Registered Representative

### **Exams, Licenses & Other Professional Designations:**

- 2008: Series 7 & 66
- 1983: Certified Public Accountant (CPA)
- WA Insurance License [Life, Disability]

CPAs are licensed and regulated by their state boards of accountancy. Experience and testing requirements for licensure as a CPA generally include minimum college education, minimum experience levels, and successful passage of the Uniform CPA Examination. In order to maintain a CPA license, states generally require the completion of continuing professional education. Additionally, CPAs are required to follow a rigorous *Code of Professional Conduct* which requires that they act with integrity, objectivity, due care, competence, fully disclose any conflicts of interest (and obtain client consent if a conflict exists), maintain client confidentiality, disclose to the client any commission or referral fees, and serve the public interest when providing financial services.

## Item 3: Disciplinary Information

There are no legal or disciplinary events material to the evaluation of David Geddes.

## Item 4: Other Business Activities

David Geddes is a licensed insurance agent/broker. He may offer insurance products and receive customary fees as a result of insurance sales. A conflict of interest may arise as these insurance sales may create an incentive to recommend products based on the compensation earned. To mitigate this potential conflicts, David Geddes, as a fiduciary, will act in the client's best interest.

David Geddes is a Certified Public Accountant and partner of Geddes Chucka, PLLC, a public accounting firm (a position which comprises 95% of his time). In such capacity, he may also provide income tax preparation or accounting services. These services are independent of our firm's financial planning and investment advisory services and are governed under a separate engagement agreement. Clients have the option of engaging our representative for tax preparation or accounting services, however, they are under no obligation to do so.

### **Item 5: Additional Compensation**

David Geddes does not receive any other economic benefit for providing advisory services in addition to advisory fees.

### **Item 6: Supervision**

Monte Snider, President & Chief Compliance Officer of Snider Financial Group, supervises and monitors David Geddes's activities on a regular basis to ensure compliance with our firm's Code of Ethics. Please contact Monte Snider if you have any questions about David Geddes's brochure supplement at 425-453-7080.

### **Item 7: Requirements for State-Registered Advisers**

David Geddes has not been involved in any arbitration claim alleging damages in excess of \$2,500. Furthermore, he has neither been involved in nor found liable in any civil, self-regulatory organization, or administrative proceeding nor has been the subject of any bankruptcy petitions.