

CAUSEY DEMGEN & MOORE P.C.

Certified Public Accountants & Consultants

Suite 1450
1125 Seventeenth Street
Denver, CO 80202-2025
Telephone: (303) 296-2229
Facsimile: (303) 296-3731
www.causeycpas.com
Email: info@causeycpas.com

IARD Number: 111115

Form ADV: Part 2B Brochure Supplement

This brochure supplement provides information about the supervised persons of Causey Demgen & Moore P.C. who formulate investment advice and/or have discretionary authority over a client's assets. This document supplements Form ADV: Part 2A (Firm Brochure).

If you have any questions about the contents of this brochure, please contact us at (303) 296-2229 and/or info@causeycpas.com. The information in this brochure has not been approved or verified by the United States Securities and Exchange Commission or by any state securities authority.

Additional information about Causey Demgen & Moore P.C. is also available on the SEC's website at www.adviserinfo.sec.gov.

Causey Demgen & Moore P.C. is a Registered Investment Advisor. Registration does not imply a certain level of skill or training.

Date of Brochure: March 31, 2018

Nathanael A. Koch

Educational Background and Business Experience

Title: Officer/Shareholder, Chief Compliance Officer

Year of Birth: 1976

Education: BA Political Science
University of Colorado, Boulder, Colorado

MBA Finance & Investment Management
University of Colorado, Denver, Colorado

Background: Officer/Shareholder of the Certified Public Accounting Firm of Causey Demgen & Moore P.C. since 2013. Mr. Koch joined the firm in 2007 as an Investment Advisor Representative and Senior Manager. Prior to joining Causey Demgen & Moore P.C., Mr. Koch spent nine years with a Denver, Colorado based Registered Investment Advisory firm. Mr. Koch provides services to clients in the financial planning, investment advisory, and litigation support areas.

Disciplinary Information

None

Other Business Activities

Not Applicable

Additional Compensation

Not Applicable

Supervision

Mr. Koch is the Chief Compliance Officer and a member of the Compliance Committee. Mr. Koch has direct supervisory authority over all of Causey Demgen & Moore P.C.'s investment advisory representatives, including himself.

Tim Knight, the firm's Director of Administration and Compliance Administrator, as well as Robb Stone, Compliance Officer, review Mr. Koch's advisory activities from a compliance perspective.

Date of Brochure: March 31, 2018

Robb A. Stone

Educational Background and Business Experience

Title: Officer/Shareholder, Chief Investment Officer

Year of Birth: 1975

Education: BSBA Finance
University of Denver, Denver, Colorado

Background: Officer/Shareholder of the Certified Public Accounting Firm of Causey Demgen & Moore P.C. since 2016. Mr. Stone joined the firm in 2013 as an Investment Advisor Representative and Senior Manager. Prior to joining Causey Demgen & Moore P.C., Mr. Stone was a Director with Credit Suisse where he worked for fourteen years working with institutional asset managers. Mr. Stone provides services to clients in the financial planning, investment advisory, and litigation support areas.

Disciplinary Information

None

Other Business Activities

Not Applicable

Additional Compensation

Not Applicable

Supervision

Mr. Stone is a member of the Compliance Committee. As an investment advisor representative and supervised person, his activities are supervised by the Chief Compliance Officer.

Tim Knight, the firm's Director of Administration and Compliance Administrator, as well as Nathanael A. Koch, Chief Compliance Officer, review Mr. Stone's advisory activities from a compliance perspective.

Date of Brochure: March 31, 2018

Paul F. Demgen

Educational Background and Business Experience

Title: Principal

Year of Birth: 1950

Education: BS Accounting
Ithaca College, Ithaca, New York

MS Accounting & Taxation
Colorado State University, Fort Collins, Colorado

Background: Principal with Certified Public Accounting Firm of Causey Demgen & Moore P.C. Mr. Demgen retired as a shareholder June 30, 2015, a position he held since 1981. He has since assumed the role of Principal. Mr. Demgen provides services to clients in the tax, financial planning and investment advisory services area.

Disciplinary Information

None

Other Business Activities

Not Applicable

Additional Compensation

Not Applicable

Supervision

Mr. Demgen, a founding member of the firm of Causey Demgen & Moore P.C., is an adjunct member of the Compliance Committee. As an investment advisor representative and supervised person, his activities are supervised by the Chief Compliance Officer.

Date of Brochure: March 31, 2018

John R. Connell

Educational Background and Business Experience

Title: Principal

Year of Birth: 1944

Education: BA Economics
MBA Finance
JD Business Law
University of Denver, Denver, Colorado

Background: Principal with Certified Public Accounting Firm of Causey Demgen & Moore P.C. Mr. Connell retired as a shareholder effective June 30, 2013, a position he held since 1990. He has since assumed the role of Principal. Mr. Connell provides services to clients in the tax, litigation support, and financial planning and investment advisory services area.

Disciplinary Information

None

Other Business Activities

Not Applicable

Additional Compensation

Not Applicable

Supervision

Mr. Connell is an adjunct member of the Compliance Committee. As an investment advisor representative and supervised person, his activities are supervised by the Chief Compliance Officer.

Date of Brochure: March 31, 2018

Douglas E. Carlile, Jr.

Educational Background and Business Experience

Title: Officer/Shareholder

Year of Birth: 1960

Education: BS Civil Engineering
Colorado State University, Ft. Collins, CO

MBA
Colorado State University, Ft. Collins, CO

Background: Officer/Shareholder of the Certified Public Accounting Firm of Causey Demgen & Moore P.C. since 1994. Prior to joining Causey Demgen & Moore P.C., Mr. Carlile served for three years as a consulting engineer for Black & Veatch in Kansas City, Missouri. Among other services, Mr. Carlile provides independent third-party consulting services to issuers and underwriters of municipal debt, including financial planning and investment advisory services.

Disciplinary Information

None

Other Business Activities

Not Applicable

Additional Compensation

Not Applicable

Supervision

Mr. Carlile is an adjunct member of the Compliance Committee. As an investment advisor representative and supervised person, his activities are supervised by the Chief Compliance Officer.

Date of Brochure: March 31, 2018

William D. Glasso

Educational Background and Business Experience

Title: Officer/Shareholder

Year of Birth: 1972

Education: BA Accounting
State University of New York, Utica, NY

MBA Accounting & Finance
University of Central Florida, Orlando, FL

Background: Officer/Shareholder of the Certified Public Accounting Firm of Causey Demgen & Moore P.C. since 2008. Mr. Glasso began his career with Causey as a consultant in 1997 and subsequently went to work as a financial advisor to state and local governments with Evensen Dodge LLC and then Capital Markets Advisors, LLC, both in New York City. He rejoined Causey in 2006 as a Senior Manager and became a principal in 2008. Among other services, Mr. Glasso provides independent third party consulting services to issuers and underwriters of municipal debt, including financial planning and investment advisory services.

Disciplinary Information

None

Other Business Activities

Not Applicable

Additional Compensation

Not Applicable

Supervision

Mr. Glasso is an adjunct member of the Compliance Committee. As an investment advisor representative and supervised person, his activities are supervised by the Chief Compliance Officer.

Date of Brochure: March 31, 2018

Lyle A. Martine

Educational Background and Business Experience

Title: Officer/Shareholder

Year of Birth: 1964

Education: BA Economics
University of Colorado, Boulder, CO

BS Applied Math
University of Colorado, Boulder, CO

MS Finance
University of Colorado, Denver, CO

Background: Officer/Shareholder of the Certified Public Accounting Firm of Causey Demgen & Moore P.C. since 2013. Prior to joining Causey Demgen & Moore P.C. in 2001, Ms. Martine worked with Safeway Stores for sixteen years. Among other services, Ms. Martine provides independent third party consulting services to issuers and underwriters of municipal debt, including financial planning and investment advisory services.

Disciplinary Information

None

Other Business Activities

Not Applicable

Additional Compensation

Not Applicable

Supervision

Ms. Martine is an adjunct member of the Compliance Committee. As an investment advisor representative and supervised person, her activities are supervised by the Chief Compliance Officer.

Date of Brochure: March 31, 2018

William H. Vincent

Educational Background and Business Experience

Title: Officer/Shareholder

Year of Birth: 1960

Education: BS Business Administration
University of Colorado, Boulder, Colorado

Background: Officer/Shareholder of the Certified Public Accounting Firm of Causey Demgen & Moore P.C. since 1999. Prior to that time, Mr. Vincent was a Manager with the Firm. Mr. Vincent provides services to clients in the tax, litigation support and business valuation areas.

Disciplinary Information

None

Other Business Activities

Not Applicable

Additional Compensation

Not Applicable

Supervision

Mr. Vincent is a supervised person within the firm. Mr. Vincent does not deliver investment advice.

Date of Brochure: March 31, 2018

Cheryl C. Walton

Educational Background and Business Experience

Title: Officer/Shareholder

Year of Birth: 1958

Education: BS Business Administration
College of Charleston, Charleston, South Carolina

Background: Officer/Shareholder of the Certified Public Accounting Firm of Causey Demgen & Moore P.C. since 2005. Prior to that time, Ms. Walton was a Manager with the Firm. Ms. Walton provides services to clients in the tax, litigation support, financial planning and investment advisory services area.

Disciplinary Information

None

Other Business Activities

Not Applicable

Additional Compensation

Not Applicable

Supervision

Ms. Walton is a supervised person within the firm. Ms. Walton does not deliver investment advice.

Date of Brochure: March 31, 2018

Donn L. Aggeler

Educational Background and Business Experience

Title: Officer/Shareholder

Year of Birth: 1964

Education: BS Accounting
Metropolitan State College of Denver, Denver, CO

Background: Officer/Shareholder of the Certified Public Accounting Firm of Causey Demgen & Moore P.C. since 2006. Prior to that time, Ms. Aggeler was a Manager with the Firm for seven years. Ms. Aggeler provides services to clients primarily in the auditing and accounting areas.

Disciplinary Information

None

Other Business Activities

Not Applicable

Additional Compensation

Not Applicable

Supervision

Ms. Aggeler is a supervised person within the firm. Ms. Aggeler does not deliver investment advice.

Date of Brochure: March 31, 2018

Jamey L. Camp

Educational Background and Business Experience

Title: Officer/Shareholder

Year of Birth: 1983

Education: BA Accounting, Business Administration with Emphasis in Quantitative Analysis
Mount Union College, Ohio

Background: Officer/Shareholder of the Certified Public Accounting Firm of Causey Demgen & Moore P.C. since 2017. Prior to that time Ms. Camp was a Manager with the firm for nine years. Ms. Camp provides services to clients primarily in the tax area.

Disciplinary Information

None

Other Business Activities

Not Applicable

Additional Compensation

Not Applicable

Supervision

Ms. Camp is a supervised person within the firm. Ms. Camp does not deliver investment advice.

Date of Brochure: March 31, 2018

Michael C. Graef

Educational Background and Business Experience

Title: Officer/Shareholder

Year of Birth: 1967

Education: BA Business Economics
University of California, Santa Barbara, CA

Background: Officer/Shareholder of the Certified Public Accounting Firm of Causey Demgen & Moore P.C. since 2006. Prior to that time Mr. Graef was a Manager with the firm for nine years. Mr. Graef provides services to clients primarily in the tax area.

Disciplinary Information

None

Other Business Activities

Not Applicable

Additional Compensation

Not Applicable

Supervision

Mr. Graef is a supervised person within the firm. Mr. Graef does not deliver investment advice.

Date of Brochure: March 31, 2018

Barry E. Koritza

Educational Background and Business Experience

Title: Officer/Shareholder

Year of Birth: 1955

Education: AA Accounting
William Rainey Harper Junior College, Palatine, IL

BSBA Accounting
University of Arkansas, Fayetteville, AR

Background: Officer/Shareholder of the Certified Public Accounting Firm of Causey Demgen & Moore P.C. since 1988. Mr. Koritza provides services to clients primarily in the auditing and accounting areas.

Disciplinary Information

None

Other Business Activities

Not Applicable

Additional Compensation

Not Applicable

Supervision

Mr. Koritza is a supervised person within the firm. Mr. Koritza does not deliver investment advice.

Date of Brochure: March 31, 2018

Steven L. Oltmans

Educational Background and Business Experience

Title: Principal

Year of Birth: 1954

Education: BS Accounting
Rutgers University, Newark, NJ

Juris Doctorate of Law
Rutgers University, Newark, NJ

LLM Degree in Tax
University of Denver, Denver, CO

Background: Principal with the Certified Public Accounting Firm of Causey Demgen & Moore P.C. Mr. Oltmans retired as a shareholder effective June 30, 2017, a position he held since 2007. He has since assumed the role of Principal. Mr. Oltmans has more than 25 years of experience with Arthur Anderson and Price Waterhouse Coopers providing broad-based tax and business advisory services to diverse public and private companies and high net-worth individuals.

Disciplinary Information

None

Other Business Activities

Not Applicable

Additional Compensation

Not Applicable

Supervision

Mr. Oltmans is a supervised person within the firm. Mr. Oltmans does not deliver investment advice.

Date of Brochure: March 31, 2018

Thomas J. Ruygrok

Educational Background and Business Experience

Title: Officer/Shareholder | President

Year of Birth: 1953

Education: BS Business Administration
University of Southern California

Background: Officer/Shareholder of the Certified Public Accounting Firm of Causey Demgen & Moore P.C. since 2000. Mr. Ruygrok provides services to clients primarily in the auditing and accounting areas.

Disciplinary Information

None

Other Business Activities

Not Applicable

Additional Compensation

Not Applicable

Supervision

Mr. Ruygrok is a supervised person within the firm. Mr. Ruygrok does not deliver investment advice.

Date of Brochure: March 31, 2018