



**JAMES L. CORBEAU**

**SPRINGWATER WEALTH MANAGEMENT, LLC**

This Brochure Supplement provides additional information about James L. Corbeau that supplements the Springwater Wealth Management, LLC ADV Part 2A Brochure.

You should have received a copy of that Brochure. Please contact us at (888) 998-4796 or by email at [questions@springwaterwealth.com](mailto:questions@springwaterwealth.com) if you did not receive a copy of that Brochure, or if you have any questions about the contents of this Brochure Supplement. The information in this Brochure Supplement has not been approved or verified by the United States Securities and Exchange Commission or by any state securities authority.

Additional information about James L. Corbeau is also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov). You can search this site by a unique identifying number, known as a CRD number. The CRD number for Springwater Wealth Management, LLC is 167539.

Springwater Wealth Management, LLC  
6600 SW 105<sup>th</sup> Avenue, Suite 155  
Beaverton, OR 97008

(888) 998-4796

[www.springwaterwealth.com](http://www.springwaterwealth.com)



## ITEM 2 – EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

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jim.corbeau@springwaterwealth.com

Year Born: 1964

### Educational Background:

Extension Certificate, Personal Financial Planning – University of California, Santa Cruz (2001)

M.B.A., Financial and International Business – University of Wisconsin, Madison (1990)

B.A., Political Science – University of California, Berkeley (1986)

### Business Background:

03/2013 – Present: Principal and Investment Advisor Representative, Springwater Wealth Management, LLC

08/2000 – 12/2013: Managing Member, Maas Capital Advisors, LLC

05/1996 – 08/2000: Director – Corporate Banking, Fortis Bank (Nederland) NV

### Professional Qualifications:

Series 65, Uniform Investment Adviser Law Examination (2002)

### Professional Designations:

Certified Financial Planner (CFP®)

Certified Divorce Financial Analyst (CDFA®)

## ITEM 3 – DISCIPLINARY INFORMATION

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Mr. Corbeau has no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

## ITEM 4 – OTHER BUSINESS ACTIVITIES

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The principal business of Mr. Corbeau is that of a registered investment advisor and provider of financial planning services.

## ITEM 5 – ADDITIONAL COMPENSATION

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Mr. Corbeau does not receive any additional compensation that is required to be disclosed under this Item 5.

## ITEM 6 – SUPERVISION

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Springwater's day-to-day operations are supervised by the company's principals, James L. Corbeau and Terence A. Donahe. Mr. Corbeau also acts as the company's Chief Compliance Officer (CCO). All investment strategies are discussed and approved by the Springwater investment committee, composed of the company's principals.



**TERENCE A. DONAHE**

**SPRINGWATER WEALTH MANAGEMENT, LLC**

This Brochure Supplement provides additional information about Terence A. Donahe that supplements the Springwater Wealth Management, LLC ADV Part 2A Brochure.

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Additional information about Terence A. Donahe is also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov). You can search this site by a unique identifying number, known as a CRD number. The CRD number for Springwater Wealth Management, LLC is 167539.

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## **ITEM 2 – EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE**

terry.donahe@springwaterwealth.com

Year Born: 1965

### **Educational Background:**

M.S.F.S., Financial Services – The American College (2002)

M.S.M., Management – The American College (1996)

B.A., Economics – Stanford University (1987)

### **Business Background:**

03/2013 – Present: Principal and Investment Advisor Representative, Springwater Wealth Management, LLC

12/2002 – 12/2013: Managing Member, Cascade Wealth Management, LLC

### **Professional Qualifications:**

Series 65, Uniform Investment Adviser Law Examination (2000)

Series 7, General Securities Representative Examination (1988)

Series 63, Uniform Securities Agent State Law Examination (1988)

### **Professional Designations:**

Certified Financial Planner (CFP®)

Chartered Financial Consultant (ChFC®)

Chartered Life Underwriter (CLU®)

## **ITEM 3 – DISCIPLINARY INFORMATION**

Mr. Donahe has no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

## **ITEM 4 – OTHER BUSINESS ACTIVITIES**

The principal business of Mr. Donahe is that of a registered investment advisor and provider of financial planning services.

## **ITEM 5 – ADDITIONAL COMPENSATION**

Mr. Donahe does not receive any additional compensation that is required to be disclosed under this Item 5.

## **ITEM 6 – SUPERVISION**

Springwater's day-to-day operations are supervised by the company's principals, James L. Corbeau and Terence A. Donahe. Mr. Corbeau also acts as the company's Chief Compliance Officer (CCO). All investment strategies are discussed and approved by the Springwater investment committee, composed of the company's principals.



**FRANK G. REMUND**

**SPRINGWATER WEALTH MANAGEMENT, LLC**

This Brochure Supplement provides additional information about Frank G. Remund that supplements the Springwater Wealth Management, LLC ADV Part 2A Brochure.

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Additional information about Frank G. Remund is also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov). You can search this site by a unique identifying number, known as a CRD number. The CRD number for Springwater Wealth Management, LLC is 167539.

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**ITEM 2 – EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE**

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frank.remund@springwaterwealth.com

Year Born: 1978

**Educational Background:**

Certificate in Financial Planning – City University of New York (2004)

B.S., Economics – University of Washington (2002)

**Business Background:**

01/2017 – Present: Investment Advisor Representative, Springwater Wealth Management, LLC

12/2011 – Present: Tax Preparer, H&R Block

10/2007 – 12/2016: Managing Member, Remund Financial Planning, LLC

**Professional Qualifications:**

Series 66, Uniform Combined State Law Examination (2007)

**Professional Designations:**

Certified Financial Planner (CFP®)

Enrolled Agent (EA)

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**ITEM 3 – DISCIPLINARY INFORMATION**

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Mr. Remund has no legal or disciplinary events that are material to a prospective client's evaluation of this advisory business.

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**ITEM 4 – OTHER BUSINESS ACTIVITIES**

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The principal business of Mr. Remund is that of a registered investment advisor and provider of financial planning services. Additionally, Mr. Remund provides tax planning and tax preparation services for H&R Block, a nationwide provider of tax preparation services. As Mr. Remund may be paid for his tax preparation services, there may be a conflict of interest. At all times, you are free to choose an outside tax preparer to avoid the possibility of there being a conflict of interest.

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**ITEM 5 – ADDITIONAL COMPENSATION**

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Mr. Remund does not receive any additional compensation that is required to be disclosed under this Item 5.

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**ITEM 6 – SUPERVISION**

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Springwater's day-to-day operations are supervised by the company's principals, James L. Corbeau and Terence A. Donahe. Mr. Corbeau also acts as the company's Chief Compliance Officer (CCO). Mr. Corbeau can be reached at (888) 998-4796.



**ROBERT C. UNGER**

**SPRINGWATER WEALTH MANAGEMENT, LLC**

This Brochure Supplement provides additional information about Robert C. Unger that supplements the Springwater Wealth Management, LLC ADV Part 2A Brochure.

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Additional information about Robert C. Unger is also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov). You can search this site by a unique identifying number, known as a CRD number. The CRD number for Springwater Wealth Management, LLC is 167539.

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## ITEM 2 – EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

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robert.unger@cetera.com

Year Born: 1953

Educational Background:

B.A., History – University of California, Berkeley (1976)

Business Background:

05/2013 – Present: Solicitor, Springwater Wealth Management, LLC

02/2011 – 12/2013: Investment Advisor Representative, Maas Capital Advisors, LLC

01/1983 – Present: Pension Consultant, Cetera Retirement Plan Specialists

Professional Qualifications:

Series 65, Uniform Investment Adviser Law Examination (2009)

Professional Designations:

None

## ITEM 3 – DISCIPLINARY INFORMATION

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Mr. Unger has no legal or disciplinary events that are material to a prospective client's evaluation of this advisory business.

## ITEM 4 – OTHER BUSINESS ACTIVITIES

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The principal business of Mr. Unger is that of a pension consultant. Additionally, Mr. Unger is a solicitor for Springwater. As a solicitor, Mr. Unger does not provide financial planning, asset management or investment advice on behalf of Springwater. As Mr. Unger may be paid for his pension consulting services, there may be a conflict of interest. At all times, you are free to choose an outside pension consultant to avoid the possibility of there being a conflict of interest.

## ITEM 5 – ADDITIONAL COMPENSATION

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Mr. Unger does not receive any additional compensation that is required to be disclosed under this Item 5.

## ITEM 6 – SUPERVISION

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Springwater's day-to-day operations are supervised by the company's principals, James L. Corbeau and Terence A. Donahe. Mr. Corbeau also acts as the company's Chief Compliance Officer (CCO). Mr. Corbeau can be reached at (888) 998-4796.