



CAPITAL MANAGEMENT

## Brochure Supplement

Form ADV Part 2B

### Ryan Joseph Coleman, MBA, CIMA®

CRD No. 5003931

Investment Adviser Representative

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### Naviquant Capital Management LLC

CRD No. 325236

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March 11, 2024

## Item 1 – Cover Page

This Brochure Supplement provides information about Ryan Coleman that supplements the Disclosure Brochure of Naviquant Capital Management LLC, CRD No. 325236. You should have received a copy of that Disclosure Brochure. Please contact Jocelyn Servignat at (971) 340-4832 if you did not receive the Disclosure Brochure or if you have any questions about the contents of this Brochure Supplement.

Additional information about Ryan is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) which can be found using his CRD No. 5003931.

## Item 2: Educational Background and Business Experience

Born: 1982

### Educational Background

- University of Oregon – Charles H. Lundquist College of Business, Master of Business Administration (MBA), June 2021
- Monmouth University, Bachelor of Science (BS), Marketing, 2005

### Business Experience

- April 2023 – Present: Naviquant Capital Management LLC, Principal Partner and Investment Adviser Representative
- January 2019 – October 2022: New York Life, Senior Advisor Consultant
- October 2010 to January 2019: Oppenheimer Funds, Senior Advisor Consultant

### Professional Designations, Licensing and Exams

Certified Investment Management Analyst® (CIMA®). Ryan achieved the CIMA designation in 2018. The Certified Investment Management Analyst (CIMA®) is a professional certification granted by the Investment Management Consultants Association, Inc. (IMCA®).

To attain the right to use the CIMA® certification, an individual must satisfactorily fulfill the following requirements:

- Education – The CIMA® certification process requires candidates to pass two examinations administered by IMCA®: a Qualification Examination and a Certification Examination. In addition, candidates must successfully complete the Registered Education Provider's assessment during the education component of the program.
- Experience – Individual must have three years of financial services experience.

Individuals who become certified must complete (40) hours of continuing education every two years.

### Item 3: Disciplinary Information

Ryan has never been involved in an arbitration claim of any kind, and has never been found liable in a civil, self-regulatory organization, or administrative proceeding.

### Item 4: Other Business Activities

Ryan is not involved in any other business activities.

### Item 5: Additional Compensation

Other than compensation received for his services as an independent contractor, Ryan does not receive any additional compensation from non-clients for providing advisory services to clients of Naviquant Capital Management LLC.

### Item 6: Supervision

Jocelyn Servignat, Chief Compliance Officer of Naviquant Capital Management LLC is responsible for supervision. Supervision is administered through the application of and adherence to written policies and procedures. He may be contacted at the phone number on this Brochure Supplement or at [jocelyn@naviquant.com](mailto:jocelyn@naviquant.com).