

# Brochure Supplement

Part 2B of Form ADV

March 15, 2024

## Clelland & Company, Inc.

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Clelland & Company's investment decision-makers and associates are required to have a minimum of a college degree, plus work experience and an understanding of investments and portfolio management techniques. Portfolio managers are required to have passed or be making progress towards passing the Uniform Investment Adviser (Series 65) Examination and to hold other relevant professional designations such as the Chartered Financial Analyst® (CFA®), Certified Investment Management Analyst<sup>SM</sup> (CIMA®), or Certified Private Wealth Advisor<sup>SM</sup> (CPWA®) designations.

**This document provides information about the investment professionals of Clelland & Company, Inc. You should have received a copy of the Firm Brochure to which this is a supplement. Please contact us at (858) 587-8700 and/or [info@clelland.com](mailto:info@clelland.com) if you did not receive Clelland & Company's brochure or if you have any questions about the contents of this supplement.**

Additional information about Matthew D. Medeiros and Hannah C. O'Loughlin are available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

**Item 2 Educational Background and Business Experience**

**Matthew D. Medeiros, CPWA<sup>®</sup>**

DOB: 1974

President/CEO, Chief Compliance Officer, Clelland & Company, Inc., 2022-present

Vice President, Clelland & Company, Inc. 2017-2022

Portfolio Manager/Investment Analyst, Clelland & Company, Inc. 1998-2017

Education: B.A. Mathematical Economics, 1997 Trinity College, Hartford, CT

Registered Investment Advisor, Series 65

Certified Private Wealth Advisor<sup>SM</sup> (CPWA<sup>®</sup>)

**Explanation of Professional Designation:**

**CERTIFIED PRIVATE WEALTH ADVISOR<sup>®</sup> (CPWA<sup>®</sup>)**

The CPWA designation signifies that an individual has met initial and on-going experience, ethical, education, and examination requirements for the professional designation, which is centered on private wealth management topics and strategies for high-net-worth clients. Prerequisites for the CPWA designation are: a Bachelor's degree from an accredited college or university or one of the following designations or licenses: CIMA<sup>®</sup>, CIMC<sup>®</sup>, CFA<sup>®</sup>, CFP<sup>®</sup>, ChFC<sup>®</sup>, or CPA license; have an acceptable regulatory history as evidenced by FINRA Form U-4 or other regulatory requirements and five years of professional client-centered experience in financial services or a related industry. CPWA designees have completed a rigorous educational process that includes self-study requirements, an in-class education component, and successful completion of a comprehensive examination. CPWA designees are required to adhere to the Investments & Wealth Institute's<sup>®</sup> *Code of Professional Responsibility and Rules and Guidelines for Use of the Marks*. CPWA designees must report 40 hours of continuing education credits, including two ethics hours, every two years to maintain the certification. The designation is administered through Investments & Wealth Institute<sup>®</sup>.

**Item 3 Disciplinary Information**

Mr. Medeiros has had no legal or disciplinary actions taken against him.

**Item 4 Other Business Activities**

Outside of his activities at Clelland & Company, Inc., Mr. Medeiros is on the Investment Committee for Just in Time for Foster Youth and the Budget Committee Grant TK-8 PTA. These activities are not compensated and do not take a substantial (i.e. more than 10%) amount of time.

**Item 5 Additional Compensation**

Mr. Medeiros does not receive any earned income outside of the compensation earned from Clelland & Company, Inc.

**Item 6 Supervision**

Mr. Medeiros is President/CEO and Chief Compliance Officer of the Company. All employees are directly supervised by him. Phone: (858) 587-8700; E-mail: [matt@clelland.com](mailto:matt@clelland.com).

**Item 2 Educational Background and Business Experience**

**Hannah C. O'Loughlin, CFA®**

DOB: 1976

Vice President, CFO, Clelland & Company, Inc., 2022-present

Portfolio Manager/Investment Analyst, Clelland & Company, Inc., 2000-2022

Education: B.A. Finance, 2000 University of Wisconsin, Madison

Registered Investment Advisor, Series 65

Chartered Financial Analyst® (CFA®)

**Explanation of Professional Designation:**

The Chartered Financial Analyst (CFA) charter is a globally respected, graduate-level investment credential established in 1962 and awarded by CFA Institute — the largest global association of investment professionals. There are currently more than 160,000 CFA charter-holders working in 164 markets. To earn the CFA charter, candidates must: 1) pass three sequential, six-hour examinations; 2) have at least four years of qualified professional investment experience; 3) join CFA Institute as members; and 4) commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct.

The CFA Program curriculum provides a comprehensive framework of knowledge for investment decision making and is firmly grounded in the knowledge and skills used every day in the investment profession. The three levels of the CFA Program test a proficiency with a wide range of fundamental and advanced investment topics, including ethical and professional standards, fixed-income and equity analysis, alternative and derivative investments, economics, financial reporting standards, portfolio management, and wealth planning.

**Item 3 Disciplinary Information**

Mrs. O'Loughlin has had no legal or disciplinary actions taken against her.

**Item 4 Other Business Activities**

Outside of her activities at Clelland & Company, Inc., Mrs. O'Loughlin does not engage in any business activities which represent a substantial source (i.e. more than 10%) of her time or income.

**Item 5 Additional Compensation**

Mrs. O'Loughlin does not receive any earned income outside of the compensation earned from Clelland & Company, Inc.

**Item 6 Supervision**

Hannah O'Loughlin reports to Matthew Medeiros, President/CEO.

Matthew Medeiros, President/CEO

Phone: (858) 587-8700; E-mail: matt@clelland.com