



DBFitzpatrick

Firm Brochure Part 2A of Form ADV February 29, 2024

This brochure provides information about the qualifications and business practices of DB Fitzpatrick. If you have any questions about the contents of this brochure, please contact us at: (208) 342-2280, or by email at: tom@dbfitzpatrick.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 DB Fitzpatrick is also available on the SEC's website at www.adviserinfo.sec.gov. DB Fitzpatrick is a registered investment advisor. Registration with the Securities and Exchange Commission (SEC) does not imply a certain level of skill or training.

DB FITZPATRICK

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Material Changes (Part 2A & 2B)

Annual Update

The brochure received an annual update on February 29, 2024.

Material Changes since the Last Update

- There have been no material changes at the Firm since the last update.

Full Brochure Available

To receive a complete copy of our Firm Brochure, please contact us by telephone at: (208) 342-2280 or by email at: tom@dbfitzpatrick.com.

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Advisory Business

Firm Description

DB Fitzpatrick was founded in 1984.

DB Fitzpatrick provides personalized confidential investment management to individuals, pension and profit sharing plans, trusts, estates, charitable organizations, and small businesses.

DB Fitzpatrick is strictly a fee-only investment management firm. The firm does not sell annuities, insurance, stocks, bonds, mutual funds, limited partnerships, or other commissioned products. The firm is not affiliated with entities that sell financial products or securities. No commissions in any form are accepted. No finder's fees are accepted.

Although DB Fitzpatrick and the client develop a mutual understanding regarding long-term strategic asset allocation, DB Fitzpatrick maintains final control regarding security selection and asset allocation on a continuous basis. DB Fitzpatrick does not act as a custodian of client assets. The client always maintains asset control. DB Fitzpatrick places trades for clients under a limited power of attorney.

Other professionals (e.g., lawyers, accountants, insurance agents, etc.) are engaged directly by the client on an as-needed basis. Conflicts of interest will be disclosed to the client in the unlikely event they should occur.

The initial meeting, which may be by telephone, is free of charge and is considered an exploratory interview to determine the extent to which investment management may be beneficial to the client.

Principal Owners

Dennis B. Fitzpatrick is a 71% stockholder.

Brandon C. Fitzpatrick is a 29% stockholder.

Types of Advisory Services

DB Fitzpatrick manages client investment portfolios. DB Fitzpatrick sends general information to clients including a periodic investment outlook that includes information about market conditions and is also available to non-clients on our website or by request.

As of December 31, 2024, DB Fitzpatrick manages approximately \$1.32 billion in assets for approximately 111 clients. The total firm assets include approximately \$843 million in whole loan commercial mortgages, which are not liquid securities. The mortgage program provides customized funding with commercial properties as collateral. Most accounts are

managed on a discretionary basis. Two accounts are managed on a non-discretionary basis due to the restrictions and limitations placed by the clients.

Tailored Relationships

The goals and objectives for each client are documented in our client relationship management system. The Investment Advisor Agreement reflects the stated goals and/or objectives. Clients may impose restrictions on investing in certain securities or types of securities.

Types of Agreements

The typical client relationship is defined by an Investment Advisor Agreement. This type of agreement is discussed below.

Investment Advisor Agreement

An Investment Advisor Agreement is always executed as part of the relationship.

Most clients choose to have DB Fitzpatrick manage their assets in order to obtain ongoing in-depth advice and life planning. All aspects of the client's financial affairs are reviewed. Realistic and measurable goals are set and objectives to reach those goals are defined. As goals and objectives change over time, suggestions are made and implemented on an ongoing basis.

The scope of work and fee for an Investment Advisor Agreement is provided to the client in writing prior to the start of the relationship.

Although the Investment Advisor Agreement is an ongoing agreement and constant adjustments are required, the length of service to the client is at the client's discretion. The client or the investment manager may terminate an Agreement by written notice to the other party. At termination, fees will be billed on a pro rata basis for the portion of the quarter completed. The portfolio value at the completion of the prior full billing quarter is used as the basis for the fee computation, adjusted for the number of days during the billing quarter prior to termination.

Asset Management

Assets may be invested in exchange-traded funds, equities (stocks), warrants, corporate debt securities, commercial paper, commercial mortgages, certificates of deposit, municipal securities, investment company securities (variable life insurance, variable annuities, and mutual funds shares), U. S. government securities, U.S. government agency securities, options contracts, futures contracts, and interests in partnerships.

Securities may be purchased or sold through a brokerage account when appropriate. The brokerage firm may charge a fee for securities trades. DB Fitzpatrick does not receive any compensation, in any form, from fund companies or brokerage firms.

The brokerage firm selection process includes a review of the research provided, execution capabilities, commission rate, financial responsibility, privacy policy, security policy, administrative resources, and responsiveness.

Initial public offerings (IPOs) are not available through DB Fitzpatrick.

Fees and Compensation

Description

DB Fitzpatrick bases its fees on a percentage of assets under management. The fee schedule is detailed in the Investment Advisor Agreement section above. Fees are negotiable.

The annual Investment Advisor Agreement fee is based on a percentage of the investable assets according to the following schedule:

Equity and Balanced Accounts:

- 1.00% on the first \$1,000,000;
- 0.75% on the next \$4,000,000 (from \$1,000,001 to \$5,000,000); and
- 0.50% on the assets above \$5,000,001.

Fixed Income Accounts:

- 0.25% on the first \$30,000,000;
- 0.15% on the assets above \$30,000,001.

Commercial Mortgage Program:

- 0.34% on the first \$100,000,000;
- 0.28% on the next \$100,000,000 (from \$100,000,001 to \$200,000,000); and
- 0.23% on assets above \$200,000,001.

Current client relationships may exist where the fees are higher or lower than the fee schedule above.

Fee Billing

Investment management fees are usually billed quarterly, in advance, meaning that we invoice you before the three-month billing period has begun. Payment in full is expected upon invoice presentation. Fees are usually deducted from a designated client account to facilitate billing. If an account terminates during a quarter, the client will receive a refund based on the remaining number of days remaining in the quarter. The client must consent

in advance to direct debiting of their investment account. Fees may be assessed monthly upon client request.

Other Fees

Custodians may charge transaction fees on purchases or sales of certain exchange-traded funds. These transaction charges are usually small and incidental to the purchase or sale of a security. The selection of the security is more important than the nominal fee that the custodian charges to buy or sell the security. Brokerage fees are discussed in the Asset Management section on the previous page.

DB Fitzpatrick in its sole discretion, may waive its minimum fee and/or charge a lesser investment advisory fee based upon certain criteria (e.g., historical relationship, type of assets, anticipated future earning capacity, anticipated future additional assets, dollar amounts of assets to be managed, related accounts, account composition, negotiations with clients, etc.).

Expense Ratios

Mutual funds generally charge a management fee for their services as investment managers. The management fee is called an expense ratio. For example, an expense ratio of 0.50 means that the mutual fund company charges 0.5% for their services. Performance figures quoted by mutual fund companies in various publications are after their fees have been deducted.

DB Fitzpatrick may purchase mutual funds as part of their investment strategy.

Past Due Accounts and Termination of Agreement

DB Fitzpatrick reserves the right to stop work on any account that is more than 90 days overdue.

A Client may terminate any of the aforementioned agreements at any time by notifying DB Fitzpatrick. If the client made an advance payment, DB Fitzpatrick will refund any unearned portion of the advance payment.

DB Fitzpatrick may terminate any of the aforementioned agreements at any time by notifying the client in writing. If the client made an advance payment, DB Fitzpatrick will refund any unearned portion of the advance payment.

Performance-Based Fees

Sharing of Capital Gains

Fees are not based on a share of the capital gains or capital appreciation of managed securities.

DB Fitzpatrick does not use a performance-based fee structure because of the potential conflict of interest. Performance-based compensation may create an incentive for the adviser to recommend an investment that may carry a higher degree of risk to the client.

Types of Clients

Description

DB Fitzpatrick generally provides investment advice to individuals, high net worth individuals, insurance companies, pension and profit sharing plans, trusts, estates, charitable organizations, government entities, and corporations or business entities.

Client relationships vary in scope and length of service.

Account Minimums

The minimum account size for wealth management is \$200,000 of assets under management, which equates to an annual fee of \$2,000. The minimum account size for fixed income is \$2,000,000 of assets under management, which equates to an annual fee of \$5,000.

DB Fitzpatrick has the discretion to waive the account minimum. Accounts of less than the minimum requirement may be set up when the client and the advisor anticipate the client will add additional funds to the accounts bringing the total to the minimum requirement within a reasonable time. Other exceptions may apply depending on specific circumstances and will be reviewed on an individual basis.

Methods of Analysis, Investment Strategies and Risk of Loss

Methods of Analysis

Security analysis methods may include charting, fundamental analysis, technical analysis, and cyclical analysis.

The main sources of information include financial newspapers and magazines, inspections of corporate activities, research materials prepared by others, corporate rating services, annual reports, prospectuses, filings with the Securities and Exchange Commission, and company press releases.

Other sources of information that DB Fitzpatrick may use include Schwab, Yahoo Finance, Morningstar, and Bloomberg.

Investment Strategies

The primary investment strategy for equity accounts is a global equity portfolio, which is composed of individual stocks and exchange traded funds that add further diversification among regions and market sectors. We also provide a portfolio of exchange traded funds and mutual funds for our clients, in which we employ strategic allocation among carefully selected world markets to provide efficient portfolio diversification. For equity clients that desire fixed income securities in their portfolios, we utilize fixed income exchange traded funds as well as investment grade debt securities issued by the U.S. Treasury, Government Agencies, and U.S. corporations. Portfolios are globally diversified to control the risk associated with traditional markets.

The investment strategy for a specific client is based upon the objectives stated by the client during consultations. The client may change these objectives at any time. Each client executes an Investment Advisor Agreement that documents their objectives and their desired investment strategy.

For institutional fixed income accounts we utilize investment grade debt securities issued by the U.S. Treasury, government agencies, and U.S. corporations (or dollar denominated bonds from foreign companies). We use sector allocation and duration positioning (based on our economic and financial forecast) to attempt to outperform broad market benchmarks.

Risk of Loss

All investment programs have certain risks that are borne by the investor. Our investment approach constantly keeps the risk of loss by clients in mind. Investors face the following investment risks:

- **Interest-rate Risk:** Fluctuations in interest rates may cause investment prices to fluctuate. For example, when interest rates rise, yields on existing bonds become less attractive, causing their market values to decline.
- **Market Risk:** The price of a security, bond, or mutual fund may drop in reaction to tangible and intangible events and conditions. This type of risk is caused by external

factors independent of a security's particular underlying circumstances. For example, political, economic and social conditions may trigger market events.

- **Inflation Risk:** When any type of inflation is present, a dollar today will not buy as much as a dollar next year, because purchasing power is eroding at the rate of inflation.
- **Currency Risk:** Overseas investments are subject to fluctuations in the value of the dollar against the currency of the investment's originating country. This is also referred to as exchange rate risk.
- **Reinvestment Risk:** This is the risk that future proceeds from investments may have to be reinvested at a potentially lower rate of return (i.e. interest rate). This primarily relates to fixed income securities.
- **Business Risk:** These risks are associated with a particular industry or a particular company within an industry. For example, oil-drilling companies depend on finding oil and then refining it, a lengthy process, before they can generate a profit. They carry a higher risk of profitability than an electric company, which generates its income from a steady stream of customers who buy electricity no matter what the economic environment is like.
- **Liquidity Risk:** Liquidity is the ability to readily convert an investment into cash. Generally, assets are more liquid if many traders are interested in a standardized product. For example, Treasury Bills are highly liquid, while real estate properties are not.
- **Financial Risk:** Excessive borrowing to finance a business' operations increases the risk of profitability, because the company must meet the terms of its obligations in good times and bad. During periods of financial stress, the inability to meet loan obligations may result in bankruptcy and/or a declining market value.

Disciplinary Information

Legal and Disciplinary

The firm and its employees have not been involved in any legal or disciplinary events related to past or present investment clients.

Other Financial Industry Activities and Affiliations

Financial Industry Activities

DB Fitzpatrick is registered as an investment advisor.

Affiliations

DB Fitzpatrick has relationships with custodians that are material to the advisory business and our clients. Choosing a custodian is a personal preference and is based on client preferences. The custodian is chosen by the client. However, we do recommend Charles Schwab as the custodian for wealth management clients. DB Fitzpatrick does not receive any compensation directly or indirectly for accounts held with Charles Schwab as a custodian. This relationship does not present a material conflict of interest.

Code of Ethics, Participation or Interest in Client Transactions and Personal Trading

Code of Ethics

The employees of DB Fitzpatrick have committed to a Code of Ethics. The company Code of Ethics requires employees to place the interests of Advisory Clients first, avoid taking inappropriate advantage of their position, conduct all personal securities transactions in full compliance with the code, and maintain confidentiality. This Code of Ethics policy is available for review by clients and prospective clients and will be provided upon request.

Participation or Interest in Client Transactions

DB Fitzpatrick and its employees may buy or sell securities that are also held by clients. Employees may not trade their own securities ahead of client trades. Employees often hold many of the same securities held in client accounts, but the employees' actual holdings as a percentage of their portfolio may differ from client accounts due to the employees having different risk tolerances. Additionally, employees may hold the same securities as clients but as part of different investment strategies. Employees comply with the provisions of the DB Fitzpatrick Policies and Procedures Manual.

Personal Trading

The Chief Compliance Officer of DB Fitzpatrick is Tom Walker. He reviews all employee trades quarterly. His trades are reviewed by Brandon Fitzpatrick. The personal trading reviews ensure that the personal trading of employees does not affect the markets, and that clients of the firm receive preferential treatment. Employee trades are generally small and do not affect the securities markets.

Brokerage Practices

Selecting Brokerage Firms

DB Fitzpatrick does not have any affiliation with product sales firms. Specific custodian recommendations are made to Clients based on their need for such services. DB Fitzpatrick recommends custodians based on the proven integrity and financial responsibility of the firm and the best execution of orders at reasonable commission rates.

DB Fitzpatrick recommends discount brokerage firms and trust companies (qualified custodians), such as Charles Schwab, BNY Mellon Bank, U.S. Bank, Principal Financial, and Northern Trust.

DB Fitzpatrick does not receive fees or commissions from any of these arrangements.

Best Execution

DB Fitzpatrick reviews the execution of trades at each custodian each quarter. The review is documented and maintained in the DB Fitzpatrick *Trading Policy* folder. Trading fees charged by the custodians is also reviewed on a quarterly basis. DB Fitzpatrick does not receive any portion of the trading fees.

Soft Dollars

DB Fitzpatrick does not enter into soft dollar arrangements.

Order Aggregation

DB Fitzpatrick has adopted trading policies that are intended to ensure that all trades are undertaken and, where necessary, allocated to advisory clients in a manner that fulfills our fiduciary obligations to each advisory client and otherwise allocates securities on a basis that is fair, equitable, consistently applied, and does not unfairly discriminate against any advisory client.

Instances where allocation may be necessary include without limitation: block trades, bunching client trades, simultaneous transactions in securities for advisory clients and the firm (or an employee of the firm) and disposition of unattractive securities (e.g., a downgraded security).

In determining whether an allocation is fair, the portfolio manager shall take into account the Company's fiduciary duties to each client; potential conflicts of interest; the facts and circumstances presented in each instance, each client's individual investment objectives, mandates and suitability; eligibility to participate in the transaction and any other

considerations which, in the sole judgment of the portfolio manager, are relevant and material to the overall goal of allocating securities on a fair and equitable basis.

Review of Accounts

Periodic Reviews

Account reviews for wealth management accounts are continuously performed by Brandon Fitzpatrick, CEO and the firm's analysts. Account reviews for fixed income accounts are continuously performed monthly by Brandon Fitzpatrick, CEO and the firm's analysts. The Commercial Mortgage account is continuously reviewed by Casey Macomb, Commercial Mortgage Portfolio Manager, Brandon Fitzpatrick, CEO, and the firm's analysts.

Review Triggers

Conditions that may trigger a review include new investment information, additions, withdrawals, and changes in a client's own situation.

Regular Reports

Account reviewers are members of the firm's Investment Committee. They are instructed to consider the client's current security positions and the likelihood that the performance of each security will contribute to the investment objectives of the client.

Clients receive periodic communications on at least an annual basis. Wealth management clients receive monthly or quarterly written account updates. Fixed income clients receive monthly or quarterly written account updates. The written updates may include a portfolio performance review, portfolio statement, transactions report, and unrealized gains and losses report.

Client Referrals and Other Compensation

Incoming Referrals

DB Fitzpatrick has been fortunate to receive many client referrals over the years. The referrals came from current clients, estate planning attorneys, accountants, employees, personal friends of employees and other similar sources. The firm does not compensate referring parties for these referrals.

Referrals Out

DB Fitzpatrick does not accept referral fees or any form of remuneration from other professionals when a prospect or client is referred to them.

Custody

Account Statements

All assets are held at a qualified custodian, which means the custodians provide account statements directly to clients at their address of record at least monthly.

Performance Reports

Clients are urged to compare the account statements received directly from their custodians to the performance report statements provided by DB Fitzpatrick.

Investment Discretion

Discretionary Authority for Trading

DB Fitzpatrick accepts discretionary authority to manage securities accounts on behalf of clients. DB Fitzpatrick has the authority to determine, without obtaining specific client consent, the securities to be bought or sold, and the amount of the securities to be bought or sold. DB Fitzpatrick does, however, manage some accounts on a nondiscretionary basis.

The client approves the custodian to be used and the commission rates paid to the custodian. DB Fitzpatrick does not receive any portion of the transaction fees or commissions paid by the client to the custodian.

Discretionary trading authority facilitates placing trades in your accounts on your behalf so that we may promptly implement the investment strategy that you have approved in writing.

Limited Power of Attorney

A limited power of attorney is a trading authorization for this purpose. The client signs a limited power of attorney so that we may quickly execute the investment strategy the client has approved.

Voting Client Securities

Proxy Votes

Unless the client designates otherwise, DB Fitzpatrick votes proxies for securities over which it maintains discretionary authority consistent with its proxy voting policy. DB Fitzpatrick generally votes according to management's recommendations. A copy of DB Fitzpatrick's proxy voting policy is available and will be provided upon request. A copy of each proxy voted is maintained and available upon request.

Financial Information

Financial Condition

DB Fitzpatrick does not have any financial impairment that will preclude the firm from meeting contractual commitments to clients.

A balance sheet is not required to be provided because DB Fitzpatrick does not serve as a custodian for client funds or securities, and does not require prepayment of fees of more than \$1,200 per client, six months or more in advance.

Disaster Recovery Plan

General

DB Fitzpatrick has a Business Continuity Plan/Disaster Recovery Plan in place that provides detailed steps to mitigate and recover from the loss of office space, communications, services or key people.

Disasters

The Business Continuity Plan/Disaster Recovery Plan covers natural disasters such as snow storms, hurricanes, tornados, and flooding. The Plan covers man-made disasters such as loss of electrical power, loss of water pressure, fire, bomb threat, nuclear emergency, chemical event, biological event, T-1 communications line outage, internet outage, cybersecurity attack, and aircraft accident. Electronic files are backed up daily and archived offsite.

Alternate Offices

Alternate offices are identified to support ongoing operations in the event the main office is unavailable. It is our intention to contact all clients within five days of a disaster that dictates moving our office to an alternate location.

Information Security Program

Information Security

DB Fitzpatrick maintains physical, electronic, and procedural safeguards to reduce the risk that your personal and confidential information may be breached.

Privacy Notice

DB Fitzpatrick is committed to maintaining the confidentiality, integrity and security of personal information that is entrusted to us.

The categories of nonpublic information that we collect may include information about personal finances, information about health to the extent that it is needed for the financial planning process, information about transactions between clients and third parties, and information from consumer reporting agencies, e.g., credit reports. We use this information to help meet personal financial goals.

With permission, we disclose limited information to attorneys, accountants, and mortgage lenders with whom a relationship has been established. Clients may opt out from sharing information with these nonaffiliated third parties by notifying us at any time by telephone, mail, fax, in person, or by emailing tammie@dbfitzpatrick.com. With permission, we share a limited amount of information with a specified brokerage firm in order to execute securities transactions.

We maintain a secure office to ensure that personal information is not placed at unreasonable risk. We employ a firewall barrier, secure data encryption techniques and authentication procedures in our computer environment.

We do not provide personal information to mailing list vendors or solicitors. We require strict confidentiality in our agreements with unaffiliated third parties that require access to personal information, including financial service companies, consultants, and auditors. Federal and state securities regulators may review our Company records and personal client records as permitted by law.

Personally identifiable client information will be maintained for the period that records are required to be maintained by federal and state securities laws. After that time, information may be destroyed.

We will notify clients in advance if our privacy policy is expected to change. We are required by law to deliver this *Privacy Notice* annually, in writing.



DBFitzpatrick

Firm Brochure Supplement 2B for Brandon Fitzpatrick, CFA February 29, 2024

This brochure supplement provides information about Brandon Fitzpatrick that supplements the DB Fitzpatrick brochure. You should have received a copy of that brochure. Please contact Tammie Gonzalez if you did not receive DB Fitzpatrick's brochure or if you have any questions about the contents of this supplement.

Additional information about Brandon Fitzpatrick is available on the SEC's website at www.adviserinfo.sec.gov.

DB FITZPATRICK

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Brochure Supplement (Part 2B of Form ADV)

Education and Business Standards

DB Fitzpatrick requires that advisors in its employment have a bachelor's degree and further coursework demonstrating knowledge of portfolio management. Examples of acceptable coursework include: MS in Economics or Finance, MBA, or CFA. Additionally, advisors must have work experience that demonstrates their aptitude for investment management.

Professional Certifications

Employee has earned certifications and credentials that are required to be explained in further detail.

Chartered Financial Analyst (CFA): Chartered Financial Analysts are licensed by the CFA Institute to use the CFA mark. CFA certification requirements:

- Hold a bachelor's degree from an accredited institution or have equivalent education or work experience.
 - Successful completion of all three exam levels of the CFA Program.
 - Have 36 months of acceptable professional work experience in the investment decision-making process.
 - Fulfill society requirements, which vary by society. Unless you are upgrading from affiliate membership, all societies require two sponsor statements as part of each application; these are submitted online by your sponsors.
 - Agree to adhere to and sign the Member's Agreement, a Professional Conduct Statement, and any additional documentation requested by CFA Institute.
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Brandon Fitzpatrick, CFA

Year of Birth: 1978

Educational Background:

- Institutions:
 - M.A. – Economics, University of Miami, 2008
 - M.A. – International Relations, University of California, San Diego, 2004
 - A.B. – International Relations, Brown University, 2000

Business Experience:

- 2019 – Present: Chief Executive Officer, DB Fitzpatrick
- 2014: Taught Investments course, Pacific University
- 2013 – 2019: President/COO, DB Fitzpatrick
- 2011: Taught Statistics course, Boise State University
- 2009 – 2013: Portfolio Manager/Economist, DB Fitzpatrick
- 2008 – 2009: Taught Economics courses, University of Miami, Miami, Florida
- 2004 – 2005: Research Analyst, AGM Finanzas, Buenos Aires, Argentina

Disciplinary Information: None

Other Business Activities:

- Board Member, College of Idaho (2017 – Present)
- Board Member, BSU Honors College Advisory Board, Boise State University (2015 – 2022)

Additional Compensation: None

Supervision:

Brandon C. Fitzpatrick supervises and reviews all employee work through frequent office interactions, remote interactions, and activities through our client relationship management system. Brandon is subject to compliance of the DB Fitzpatrick Code of Ethics and internal policies and procedures.
