

Brochure Supplement

(Part 2B of Form ADV)

Anthony Ayers, CFA

Portfolio Manager

SMI Advisory Services, LLC

4400 Ray Boll Blvd.

Columbus, Indiana 47203

Telephone: 800-796-4975

Email: AAyers@SMIAdvisory.com

NOTICE:

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March 21, 2024

GENERAL EDUCATIONAL AND BUSINESS REQUIREMENTS

Generally, SMI Advisory Services, LLC (“SMI”) requires employees to have relevant work experience in the securities industry. Any employee of SMI acting in an Investment Adviser Representative (IAR) capacity will be appropriately licensed as such.

This Brochure Supplement provides information about **Anthony Ayers**.

ITEM 2 EDUCATIONAL AND BUSINESS EXPERIENCE

Anthony Ayers, CFA, Portfolio Manager

CRD No. 2503806

Year of Birth: 1971

Education Background:

Bachelor of Science - Finance, Indiana University, Bloomington, IN (1996)

Series 63 (1994)

CFA (2002)

Business Experience:

Portfolio Manager and Investment Adviser Representative

SMI Advisory Services, LLC, Columbus, IN (2005 – Present)

Investment Adviser Representative

Omnium, LLC, Columbus, IN (2006 – 2007)

Investment Analyst

Oxford Financial Group, Carmel, IN (2000 – 2001)

Registered Securities Representative

Charles Schwab & Co., INC, Fishers, IN (1995 – 2000)

ITEM 3 DISCIPLINARY INFORMATION

Anthony Ayers, CFA, Portfolio Manager, does not have any legal or disciplinary events that are material to a client's or prospective client's evaluation.

ITEM 4 OTHER BUSINESS ACTIVITIES

Anthony Ayers is also an owner of Omnium Management Company, Inc. ("OMC"), which is the manager of Omnium Capital, LLC., which is a co-owner of SMI Advisory Services, LLC. Mr. Ayers receives a salary from OMC and shares in the profits of Omnium Capital, LLC.

ITEM 5 ADDITIONAL COMPENSATION

Other than as noted in Item 4 above, Anthony Ayers does not receive any additional compensation.

ITEM 6 SUPERVISION

Anthony Ayers is a Portfolio Manager of SMI Advisory Services. Mr. Ayers is responsible for trading client portfolios. He is supervised by Fred Beerwart, the Firm's Chief Compliance Officer, who is supervised by Mark Biller, the Firm's Senior Portfolio Manager.

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Mark Biller

Senior Portfolio Manager

SMI Advisory Services, LLC

4400 Ray Boll Blvd.

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Telephone: 800-796-4975

Email: MBiller@SMIAdvisory.com

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This Brochure Supplement provides information about **Mark Biller**.

ITEM 2 EDUCATIONAL AND BUSINESS EXPERIENCE

Mark Biller, Senior Portfolio Manager

CRD No. 5052164

Year of Birth: 1972

Education Background:

Bachelor of Science - Finance, Oral Roberts University, Tulsa, OK (1996)

Business Experience:

Senior Portfolio Manager

SMI Advisory Services, LLC, Columbus, IN (2005 – Present)

Executive Editor, Sound Mind Investing

Sound Mind Investing, Corp., Louisville, KY (2006 – 2007)

Investment Analyst

Oxford Financial Group, Carmel, IN (2000 – 2001)

ITEM 3 DISCIPLINARY INFORMATION

Mark Biller, Senior Portfolio Manager, does not have any legal or disciplinary events that are material to a client's or prospective client's evaluation.

ITEM 4 OTHER BUSINESS ACTIVITIES

Mark Biller is also an owner of Marathon Partners, LLC., which is a co-owner of SMI Advisory Services, LLC.

ITEM 5 ADDITIONAL COMPENSATION

Other than as noted in Item 4 above, Mr. Biller does not receive any additional compensation for providing investment advice beyond the fee-based compensation he receives through our Firm.

ITEM 6 SUPERVISION

Anthony Ayers is an Investment Adviser Representative of SMI Advisory Services. Mr. Ayers is responsible for providing advice to the clients. He is supervised by Fred Beerwart, the Firm's Chief Compliance Officer, who is supervised by Mark Biller, the Firm's Senior Portfolio Manager.



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Eric S. Collier, CFA

Portfolio Manager

SMI Advisory Services, LLC

4400 Ray Boll Blvd.

Columbus, Indiana 47203

Telephone: 800-796-4975

Email: ECollier@SMIAdvisory.com

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This Brochure Supplement provides information about **Eric S. Collier**.

ITEM 2 EDUCATIONAL AND BUSINESS EXPERIENCE

Eric S. Collier, CFA, Portfolio Manager, Investment Adviser Representative

CRD No. 5052172

Year of Birth: 1975

Education Background:

Bachelor of Science – Finance, Indiana University, Bloomington, IN, (1998)

Series 65 (1999)

CFA (2001)

Business Experience:

Portfolio Manager

SMI Advisory Services, LLC, Columbus, IN (2005 – Present)

Investment Adviser Representative

Omnium, LLC, Columbus, IN (2006 – 2007)

Investment Analyst

Oxford Financial Group, Carmel, IN (2000 – 2001)

Analyst

Webb Investment Advisor, Indianapolis, IN (1997 – 2000)

ITEM 3 DISCIPLINARY INFORMATION

Eric S. Collier, Investment Adviser Representative, does not have any legal or disciplinary events that are material to a client's or prospective client's evaluation.

ITEM 4 OTHER BUSINESS ACTIVITIES

Eric S. Collier is also an owner of Omnium Management Company, Inc. ("OMC"), which is the manager of Omnium Capital, LLC., which is a co-owner of SMI Advisory Services, LLC. Mr. Collier receives a salary from OMC and shares in the profits of Omnium Capital, LLC.

ITEM 5 ADDITIONAL COMPENSATION

Other than as noted in Item 4 above, Eric S. Collier does not receive any additional compensation.

ITEM 6 SUPERVISION

Eric S. Collier is a Portfolio Manager of SMI Advisory Services. Mr. Collier is responsible for trading client portfolios. He is supervised by Fred Beerwart, the Firm's Chief Compliance Officer, who is supervised by Mark Biller, the Firm's Senior Portfolio Manager.

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Bryce Fathauer, CPA

Investment Adviser Representative

SMI Advisory Services, LLC

4400 Ray Boll Blvd.

Columbus, Indiana 47203

Telephone: 800-796-4975

Email: BFathauer@SMIAdvisory.com

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This Brochure Supplement provides information about **Bryce Fathauer**.

ITEM 2 EDUCATIONAL AND BUSINESS EXPERIENCE

Bryce Fathauer, CPA, Investment Adviser Representative

CRD No. 6322824

Year of Birth: 1990

Education Background:

Bachelor of Science (Distinction) – Accounting and Finance,
Kelley School of Business, Indiana University, Bloomington, Indiana (2012)

Certified Public Accountant (2014)

Series 65 (2014)

Accredited Asset Management Specialist ®, College for Financial Planning (2015)

Business Experience:

Investment Adviser Representative

SMI Advisory Services, LLC, Columbus, IN (2014 – Present)

Finance Development Program Analyst

Cummins Engine Company, Columbus, IN (2012 – 2014)

ITEM 3 DISCIPLINARY INFORMATION

Bryce Fathauer, Investment Adviser Representative, does not have any legal or disciplinary events that are material to a client's or prospective client's evaluation.

ITEM 4 OTHER BUSINESS ACTIVITIES

Bryce owns Bryce W. Fathauer, CPA, LLC, who does the bookkeeping for Athens Church, a 501(c)(3) organization, and does not receive compensation for that work.

ITEM 5 ADDITIONAL COMPENSATION

Other than as noted in Item 4 above, Bryce Fathauer does not receive any additional compensation for providing investment advice beyond the fee-based compensation he receives through our Firm.

ITEM 6 SUPERVISION

Bryce Fathauer is an Investment Adviser Representative of SMI Advisory Services. Mr. Fathauer is responsible for providing advice to the clients. He is supervised by Fred Beerwart, the Firm's Chief Compliance Officer, who is supervised by Mark Biller, the Firm's Senior Portfolio Manager.

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Isaac Jones, CFP

Investment Adviser Representative

SMI Advisory Services, LLC

4400 Ray Boll Blvd.

Columbus, Indiana 47203

Telephone: 800-796-4975

Email: IJones@SMIAdvisory.com

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This brochure supplements provides information about **Isaac Jones**.

ITEM 2 EDUCATIONAL AND BUSINESS EXPERIENCE

Isaac Jones, Investment Adviser Representative

CRD No. 7792931

Year of Birth: 2001

Education Background:

Bachelor of Science Degree – Business, Grace College, Indianapolis, IN (2023)

Series 65 (2023)

Chartered Financial Planner (CFP) (2024)

Business Experience:

Investment Adviser Representative

SMI Advisory Services, LLC, Columbus, IN (2023 – Present)

ITEM 3 DISCIPLINARY INFORMATION

Isaac Jones, Investment Adviser Representative, does not have any legal or disciplinary events that are material to a client's or prospective client's evaluation.

ITEM 4 OTHER BUSINESS ACTIVITIES

None.

ITEM 5 ADDITIONAL COMPENSATION

None.

ITEM 6 SUPERVISION

Isaac Jones, Investment Adviser Representative of SMI Advisory Services. Mr. Jones is responsible for assisting clients and prospects. He is supervised by Fred Beerwart, the Firm's Chief Compliance Officer, who is supervised by Mark Biller, the Firm's Senior Portfolio Manager.

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Brian Mondics

Investment Adviser Representative

SMI Advisory Services, LLC

4400 Ray Boll Blvd.

Columbus, Indiana 47203

Telephone: 800-796-4975

Email: Brian@SMIAdvisory.com

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This brochure supplements provides information about **Brian Mondics**.

ITEM 2 EDUCATIONAL AND BUSINESS EXPERIENCE

Brian R. Mondics, RICP®, Investment Adviser Representative

CRD No. 7545075

Year of Birth: 1961

Education Background:

BSBA – Seton Hill University, Greensburg, PA (1998)

MBA – University of Pittsburgh, Pittsburgh, PA (2000)

Retirement Income Certified Professional (RICP®) (2023)

Business Experience:

Investment Adviser Representative

SMI Advisory Services, LLC, Columbus, IN (2023 – Present)

Financial Coach

Connect Financial Ministries/MoneyWise (2020 – Present)

Owner/CCO/Investment Adviser Representative

Higher Level Financial Services, LLC, Rock Springs, WY (2022 - 2023)

Regional Service Manager

Accuray, Sunnyvale, CA (2021 - 2023)

Regional Service Manager

IBA Proton Therapy, Reston, VA (2017 – 2021)

Regional Service Director

EMC, Pittsburgh, PA (2008 – 2017)

ITEM 3 DISCIPLINARY INFORMATION

Brian Mondics, Investment Advisor Representative, does not have any legal or disciplinary events that are material to a client's or prospective client's evaluation.

ITEM 4 OTHER BUSINESS ACTIVITIES

None.

ITEM 5 ADDITIONAL COMPENSATION

None.

ITEM 6 SUPERVISION

Brian Mondics is an Investment Advisor Representative of SMI Advisory Services. Mr. Mondics is responsible for assisting clients and prospects. He is supervised by Fred Beerwart, the Firm's Chief Compliance Officer, who is supervised by Mark Biller, the Firm's Senior Portfolio Manager

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Sandra Morrison

Investment Adviser Representative

SMI Advisory Services, LLC

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Columbus, Indiana 47203

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Email: SMorrison@SMIAdvisory.com

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This brochure supplements provides information about **Sandra Morrison**.

ITEM 2 EDUCATIONAL AND BUSINESS EXPERIENCE

Sandra Morrison, Investment Adviser Representative

CRD No. 6113277

Year of Birth: 1966

Education Background:

Bachelors of Science Degree – Chemical Engineering,
Purdue University, W. Lafayette, IN

(1988)

Series 65

(2013)

Series 6

(2014 - 2016)

Business Experience:

Investment Adviser Representative

SMI Advisory Services, LLC, Columbus, IN

(2011 – Present)

High School Science Teacher:

Columbus Christian School, Columbus, IN

(2008 – 2011)

Field Engineering Program, Process Engineer, Technical Sales:

DuPont

(1988 – 1994)

ITEM 3 DISCIPLINARY INFORMATION

Sandra Morrison, Investment Adviser Representative, does not have any legal or disciplinary events that are material to a client's or prospective client's evaluation.

ITEM 4 OTHER BUSINESS ACTIVITIES

None.

ITEM 5 ADDITIONAL COMPENSATION

None.

ITEM 6 SUPERVISION

Sandra Morrison is an Investment Adviser Representative of SMI Advisory Services. Mrs. Morrison is responsible for providing advice to the clients. She is supervised by Fred Beerwart, the Firm's Chief Compliance Officer, who is supervised by Mark Biller, the Firm's Senior Portfolio Manager.

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Paul Wilkin, CFA, CFP, CAIA, ChFC
Investment Adviser Representative

SMI Advisory Services, LLC
4400 Ray Boll Blvd.
Columbus, Indiana 47203

Telephone: 800-796-4975
Email: PWilkin@SMIAdvisory.com

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This Brochure Supplement provides information about **Paul Wilkin**.

ITEM 2 EDUCATIONAL AND BUSINESS EXPERIENCE

Paul Wilkin, CFP, CFA, ChFC, CAIA, Investment Adviser Representative

CRD No. 2233449

Year of Birth: 1962

Education Background:

BSBA – Economics, Bowling Green State University, Bowling Green, OH	(1984)
MBA – Finance, Ohio State University, Columbus, OH	(1986)
Chartered Financial Planner (CFP)	(1998)
Chartered Financial Analyst (CFA)	(2003)
Chartered Financial Consultant (ChFC)	(2006)
Chartered Alternative Investment Analyst	(2007)

Business Experience:

Investment Adviser Representative

SMI Advisory Services, LLC, Columbus, IN (2018 – Present)

Senior Investment Consultant

Hammond Associates/Mercer, St. Louis, MO (2005 – 2017)

Investment Analyst

Oxford Financial Group, Carmel, IN (2000 – 2005)

Financial Planner

American Express Financial Advisors, Dayton, OH (1994 – 2000)

Various Accounting Positions

NCR Corporation, Dayton, OH (1986 – 1993)

ITEM 3 DISCIPLINARY INFORMATION

Paul Wilkin, CFA, Investment Adviser Representative, does not have any legal or disciplinary events that are material to a client's or prospective client's evaluation.

ITEM 4 OTHER BUSINESS ACTIVITIES

None.

ITEM 5 ADDITIONAL COMPENSATION

None.

ITEM 6 SUPERVISION

Paul Wilkin is an Investment Adviser Representative of SMI Advisory Services. Mr. Wilkin is responsible for providing advice to the clients. He is supervised by Fred Beerwart, the Firm's Chief Compliance Officer, who is supervised by Mark Biller, the Firm's Senior Portfolio Manager

