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This brochure provides information about the qualifications and business practices of Jason M. Gilbert, CPA/PFS, CFF. Jason Gilbert is a Managing Partner at RGA Investment Advisors, LLC. The information in this brochure has not been approved or verified by the U.S. Securities and Exchange Commission or by any State securities authority.

Additional information about RGA Investment Advisors, LLC is available through the U.S. Securities and Exchange Commission at the following Internet site: www.adviserinfo.sec.gov.

Recent update
March 2024

Item 1

Jason M. Gilbert, CPA/PFS, CFF, CGMA

RGA Investment Advisors LLC 185 Great Neck Road, Suite 306 Great Neck, NY 11021

This Brochure Supplement provides information about Jason M. Gilbert that supplements the RGA Investment Advisors LLC Brochure. You should have received a copy of that Brochure. Please contact ria@rgaia.com if you did not receive the RGA Investment Advisors LLC Brochure or if you have any questions about the contents of this supplement.

Additional information about Jason M. Gilbert is available on our website at www.rgaia.com

Item 2 Educational Background and Business Experience

Educational Background and Business Experience

Schools Attended:

- George Washington University - M.S. 2004,
- University of Michigan, Ann Arbor - B.A. 2003

Licenses Held:

Certified Public Accountant, 2006;

Certified Public Accountant (CPA) is the title of qualified accountants in numerous countries in the English-speaking world. In the United States, the CPA is a license to provide accounting services to the public. It is awarded by each of the 50 states for practice in that state. Additionally, almost every state (49 out of 50) has passed mobility laws to allow CPAs from other states to practice in their state. State licensing requirements vary, but the minimum standard requirements include passing the Uniform Certified Public Accountant Examination, 150 semester units of college education, and one year of accounting related experience.

Personal Financial Specialist, 2008;

A Personal Financial Specialist is specialty credential for CPAs who are expert at helping individuals with all aspects of wealth management. The American Institute of Certified Public Accountants (AICPA) grants the Personal Financial Specialist (PFS) credential only to certified public accountants (CPA) with significant personal financial planning education and experience. Individuals pursue the PFS credential because they want to display their expertise and knowledge as it relates to all aspects of financial planning.

Personal Financial Specialist applicants must meet the following requirements:

- Be an AICPA member;
- Hold an unrevoked CPA certification issued by a state;
- Possess at least two years of full-time teaching or business experience (or 3000 hours equivalent) in personal financial planning within the five years previous to applying for CPA/PFS;

- A minimum of 75 hours of personal financial planning education in the five years preceding application for the PFS.
- Also, every three years, PFS professionals must complete 60 hours of continuing professional education. Annually, they must pay a fee of several hundred dollars to continue using the designation.

Certification in Financial Forensics, 2009;

A Certification in Financial Forensics (CFF) is a specialty credential in financial forensics issued by the American Institute of Certified Public Accountants (AICPA).

To obtain the CFF credential, the applicant must:

- Have a minimum of five years of experience as a Certified Public Accountant (CPA);
- Pass the CFF examination;
- Demonstrate in excess of 1,000 hours of experience doing forensic accounting work;
- Complete 75 hours of continuing professional education (CPE) related to forensic accounting.
- After obtaining the CFF credential, the CPA must continue to earn at least 20 hours of financial forensics-related CPE per year to maintain the CFF credential.

Charter in Global Management Accounting (CGMA);

The CGMA designation distinguishes professionals who have advanced proficiency in finance, operations, strategy and management. It is underpinned by extensive global research to maintain the highest relevance with employers, and develop competencies most in demand.

CGMAs qualify through rigorous education, exam and experience requirements. They must commit to lifelong education and adhere to a stringent code of ethical conduct. More than 150,000 accounting and finance professionals hold the CGMA, making it the most widely held management accounting designation in the world.

Series 65 Examination, 2009

The Uniform Investment Adviser Law Examination and the available study outline were developed by NASAA. The examination, called the Series 65 exam, is designed to qualify candidates as investment adviser representatives.

Work Experience:

- RGA Investment Advisors, LLC, Managing Partner 2009-Present
- General Atlantic, LLC, Associate, 2006-2008
- Berkery, Noyes & Co., Analyst, 2006
- KPMG LLP, Associate, 2004-2006

Business Background for at least the preceding Five Years:

- General Atlantic, Associate – 2006-2008
- RGA Investment Advisors – 2009-Present

Item 3 Disciplinary Information

Disciplinary Information

Registered investment advisors are required to disclose all material facts regarding any legal or

disciplinary events that would be material to your evaluation of each supervised person providing investment advice. No information is applicable to this item.

Item 4 Other Business Activities

Other Business Activities

No information is applicable to this item.

Item 5 Additional Compensation

Additional Compensation

Jason M. Gilbert receives no additional compensation from any other business.

Item 6 Supervision

Supervision

Our supervision structure is a firm wide process. Supervision is a multi-tiered approach: the creation and implementation of policies and procedures, reporting, due diligence and oversight provided at a firm level, and finally ongoing reporting and meetings with you. Oversight at the firm level is provided by a series of partnership committee meetings. The partnership committee, comprised of Jason Gilbert and Elliot Turner, create and maintain ongoing oversight processes for specific functions; management, investment selection, client service, and business development among others.

The advice provided to you is monitored in several ways. The monitoring begins with internal controls we have in place regarding recommended investments. As a matter of policy, an advisor is only permitted to recommend investments that have been thoroughly vetted, approved, and that have ongoing due diligence conducted by our research department.

In addition to this firm-wide control on the investments recommended to you, direct supervision is provided at the partner level. This supervision could include participating in meetings with you and reviewing recommendations. We also generally provide service to you as a team, such that a member of the team provides a level of supervision over the other. In making the specific recommendation to you, your Investment Advisor will focus on educating you on the specifics of the investment recommendations being made, in order to assist you through your engagement with RGA Investment Advisors LLC.

Item 7 Requirements for State Registered Advisors

Requirements for State Registered Advisors

Not applicable.