



MERCER GLOBAL ADVISORS INC

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Item 1 – Form ADV Part 2B / Brochure Supplement Explanation, a list of your Mercer Global Advisors Team, and the Table of Contents

This brochure provides information about the Mercer Global Advisors Business Team listed below. This information supplements the ADV, Part 2A Company Disclosure Brochure. Please contact your Advisory Team directly if you did not receive the Mercer Global Advisors Inc. Disclosure Brochure (Form ADV, Part 2A) or if you have any questions about the content of this Brochure Supplement. You may also contact the Compliance Department directly at (805) 565-1681 if you did not receive the ADV, Part 2A Company Disclosure Brochure or if you have any questions about the contents of this supplement.

Information on the following individuals is presented in this Brochure Supplement:

Alfred S. (Steve) Roberts

Jerilyn M. Alport

Carin P. Roman

Kevin D. Monson

Additional information on these individuals is available on the SEC's website at www.adviserinfo.sec.gov.

Mercer Global Advisors Inc. is registered with the Securities and Exchange Commission and delivers all investment-related services. Mercer Advisors Inc. is the parent company of Mercer Global Advisors Inc. and is not involved with investment services.

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Items 2 – 6 Your Mercer Global Advisors Team

Branch name:

Mercer Advisors Palatine, IL Branch

Address:

4801 Emerson Avenue, Suite 106
Palatine, Illinois 60067

Phone number:

(847) 303-1220

Alfred S. (Steve) Roberts, CFP®, MBA

Year Born 1968

Client Advisor & Branch Manager

Steve started his career in financial services in 1997. Steve is a veteran in the industry having attained his CFP® certification while at Brown & Tedstrom in Denver, CO. He then joined USAA as a Financial Planner and held roles in executive management. In 2009, Steve became owner, President and Chief Compliance Officer of CCP, Inc. Steve has long held a passion for financial planning and portfolio management. That passion fuels a belief that strong relationships, thoughtful consideration and direct guidance can help our clients achieve success in their financial journey. Steve received his undergraduate degree from Indiana University and an MBA from DePaul University.

Item 3 - Disclosure and/or Disciplinary Information

Registered investment advisers 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. There is NO applicable information to disclose about Steve Roberts. Other public information is available on the SEC's website at www.adviserinfo.sec.gov.

Item 4 – Other Outside Business Activities

Steve Roberts does not engage in other outside business activities.

Item 5 – Additional Compensation

Steve Roberts does not engage in other activities that render additional compensation.

Item 6 – Supervision

Mr. Joshua Gustafson, Head of Client Services of Mercer Global Advisors Inc. has supervisory responsibilities for Steve Roberts. Mr. Gustafson can be reached at (877) 642-5224.

Designation Minimum Qualifications

Steve Roberts holds the following licenses and/or credentials: MBA and a CFP®
Please see designation and/or credentialing descriptions starting on page 4.

Carin P. Roman, CFP®

Year Born 1977

Financial Planner

Carin began her financial services career in 1999. Prior to joining Mercer Advisors, she worked in institutional investment consulting before transitioning to personal financial planning and wealth management in 2001. It was at CCP Inc., the fee-only financial planning firm that her mother had founded, that Carin's passion for financial planning took root. Carin enjoys building personal relationships and developing financial plans that help individuals and families navigate their unique journeys towards their short- and long-term goals. She is a member of the Financial Planning Association (FPA) and National Association of Personal Financial Advisors (NAPFA). Carin graduated from the University of Notre Dame with degrees in Economics and French.

Item 3 - Disclosure and/or Disciplinary Information

Registered investment advisers 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. There is NO applicable information to disclose about Carin P. Roman. Other public information is available on the SEC's website at www.adviserinfo.sec.gov.

Item 4 – Other Outside Business Activities

Carin P. Roman does not engage in other outside business activities.

Item 5 – Additional Compensation

Carin P. Roman does not engage in other activities that render additional compensation.

Item 6 – Supervision

Mr. Steve Roberts, Client Advisor & Branch Manager for Mercer Global Advisors Inc., has supervisory responsibilities for Carin P. Roman. Mr. Roberts can be reached at (847) 303-1220.

Designation Minimum Qualifications

Carin P. Roman holds the following licenses and/or credentials: CFP®

Please see designation and/or credentialing descriptions starting on page 4.

Jerilyn M. Alport

Year Born 1965

Client Associate

Jerilyn began her financial career in 2018 when she joined CCP, Inc. as a Paraplanner assisting Financial Advisors in data gathering and client reporting as part of the financial planning and portfolio management reporting process. Prior to joining CCP, Inc., Jerilyn worked as a Paralegal for various Chicago law firms and corporate legal departments for over 20 years and brings her strong work ethic, exceptional problem-solving and communication skills as well as the ability to establish and maintain strong client relationships. Jerilyn recently joined Mercer Advisors in her current role as a Client Associate.

Item 3 - Disclosure and/or Disciplinary Information

Registered investment advisers 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. There is NO applicable information to disclose about Jerilyn M. Alport.

Item 4 – Other Outside Business Activities

Jerilyn M. Alport does not engage in other outside business activities.

Item 5 – Additional Compensation

Jerilyn M. Alport does not engage in other activities that render additional compensation.

Item 6 – Supervision

Mr. Steve Roberts, Client Advisor & Branch Manager for Mercer Global Advisors Inc., has supervisory responsibilities for Jerilyn M. Alport. Mr. Roberts can be reached at (847) 303-1220.

Kevin D. Monson

Year Born 1997

Client Associate

Kevin began his career in the financial services industry in 2019. Prior to joining Mercer Advisors in 2020, he was a Paraplanner for CCP, Inc. He graduated from Hillsdale College where he earned a Bachelor of Arts degree in Financial Management and played for the school's baseball team.

Item 3 - Disclosure and/or Disciplinary Information

Registered investment advisers 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. There is NO applicable information to disclose about Kevin D. Monson.

Item 4 – Other Outside Business Activities

Kevin D. Monson does not engage in other outside business activities.

Item 5 – Additional Compensation

Kevin D. Monson does not engage in other activities that render additional compensation.

Item 6 – Supervision

Mr. Steve Roberts, Client Advisor & Branch Manager for Mercer Global Advisors Inc., has supervisory responsibilities for Kevin D. Monson. Mr. Roberts can be reached at (847) 303-1220.

Designation Minimum Qualifications

CERTIFIED FINANCIAL PLANNER™ (CFP®) CERTIFICATION

The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP (with flame design) marks (collectively, the “CFP® marks”) are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”). The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients. Currently, more than 86,000 individuals have obtained CFP® certification in the United States. To attain the right to use the CFP® marks, an individual must fulfill satisfactorily the following requirements:

Education: Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board’s studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a Bachelor’s Degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP Board’s financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;

Examination: Pass the comprehensive CFP® Certification Examination. The examination includes case studies and client scenarios designed to test one’s ability to correctly diagnose financial planning issues and apply one’s knowledge of financial planning to real world circumstances;

Experience: Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and

Ethics: Agree to be bound by CFP Board’s *Standards of Professional Conduct*, a set of documents outlining the ethical and practice standards for CFP® professionals. Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks: Continuing Education – Complete 30 hours of continuing education every two years, including two hours on the *Code of Ethics* and other parts of the *Standards of Professional Conduct*, to maintain competence and keep up with developments in the financial planning field; and Ethics – Renew an agreement to be bound by the *Standards of Professional Conduct*. The Standards prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients. CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board’s enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

MASTER OF BUSINESS ADMINISTRATION (MBA) DEGREE

The Master of Business Administration (MBA or M.B.A.) is a master's degree in business administration, which attracts people from a wide range of academic disciplines. The MBA designation originated in the United States, emerging from the late 19th century as the country industrialized and companies sought out scientific approaches to management. Accreditation bodies exist specifically for MBA programs to ensure consistency and quality of graduate business education. Business schools in many countries offer MBA programs tailored to full-time, part-time, executive, and distance-learning students, with specialized concentrations.