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IARD Number: 111115

Form ADV: Part 2B Brochure Supplement

This brochure supplement provides information about the supervised persons of Causey Demgen & Moore P.C. who formulate investment advice and/or have discretionary authority over a client's assets. This document supplements Form ADV: Part 2A (Firm Brochure).

If you have any questions about the contents of this brochure, please contact us at (303) 296-2229 and/or info@causeycpas.com. The information in this brochure has not been approved or verified by the United States Securities and Exchange Commission (SEC) or by any state securities authority.

Additional information about Causey Demgen & Moore P.C. is also available on the SEC's website at www.adviserinfo.sec.gov.

Causey Demgen & Moore P.C. is a Registered Investment Advisor. Registration does not imply a certain level of skill or training.

Date of Brochure: June 30, 2020

Nathanael A. Koch

Educational Background and Business Experience

Title: Officer/Shareholder, President & Chief Compliance Officer

Year of Birth: 1976

Education: BA Political Science
University of Colorado, Boulder, Colorado

MBA Finance & Investment Management
University of Colorado, Denver, Colorado

Background: Officer/Shareholder of the Certified Public Accounting Firm of Causey Demgen & Moore P.C. since 2013. Mr. Koch joined the firm in 2007 as an Investment Advisor Representative and Senior Manager. Prior to joining Causey Demgen & Moore P.C., Mr. Koch spent nine years with a Denver, Colorado based Registered Investment Advisory firm. Mr. Koch provides services to clients in the financial planning, investment advisory, and litigation support areas.

Disciplinary Information

None

Other Business Activities

Not Applicable

Additional Compensation

Not Applicable

Supervision

Mr. Koch is the Firm President, Chief Compliance Officer and a member of the Compliance Committee. Mr. Koch has direct supervisory authority over all of Causey Demgen & Moore P.C.'s investment advisory representatives, including himself.

Robb Stone, Compliance Officer & Chief Investment Officer, reviews Mr. Koch's advisory activities from a compliance perspective.

Date of Brochure: June 30, 2020

Robb A. Stone

Educational Background and Business Experience

Title: Officer/Shareholder, Chief Investment Officer

Year of Birth: 1975

Education: BSBA Finance
University of Denver, Denver, Colorado

Background: Officer/Shareholder of the Certified Public Accounting Firm of Causey Demgen & Moore P.C. since 2016. Mr. Stone joined the firm in 2013 as an Investment Advisor Representative and Senior Manager. Prior to joining Causey Demgen & Moore P.C., Mr. Stone was a Director with Credit Suisse where he worked for fourteen years working with institutional asset managers. Mr. Stone provides services to clients in the financial planning, investment advisory, and litigation support areas.

Disciplinary Information

None

Other Business Activities

Not Applicable

Additional Compensation

Not Applicable

Supervision

Mr. Stone is a member of the Compliance Committee. As an investment advisor representative and supervised person, his activities are supervised by the Chief Compliance Officer.

Nathanael A. Koch, Chief Compliance Officer, reviews Mr. Stone's advisory activities from a compliance perspective.

Date of Brochure: June 30, 2020

Stephen T. Warren

Educational Background and Business Experience

Title: Senior Analyst

Year of Birth: 1993

Education: BA Finance
Washington State University, Pullman, Washington

Background: Senior Analyst with the Certified Public Accounting Firm of Causey Demgen & Moore P.C. since 2019.

Mr. Warren joined Causey's Management Consultant team in 2016 and subsequently Causey's Wealth Management Group as a Senior Portfolio Analyst in 2019. Mr. Warren is a member of the Investment Committee and provides portfolio management & financial planning services to our client base.

Disciplinary Information

None

Other Business Activities

Not Applicable

Additional Compensation

Not Applicable

Supervision

Mr. Warren is an investment advisor representative and supervised person. As such his activities are supervised by the Chief Compliance Officer.

Date of Brochure: June 30, 2020

Paul F. Demgen

Educational Background and Business Experience

Title: Principal

Year of Birth: 1950

Education: BS Accounting
Ithaca College, Ithaca, New York

MS Accounting & Taxation
Colorado State University, Fort Collins, Colorado

Background: Principal with Certified Public Accounting Firm of Causey Demgen & Moore P.C. Mr. Demgen retired as a shareholder June 30, 2015, a position he held since 1981. He has since assumed the role of Principal. Mr. Demgen remains a member of the firm's Investment Committee assisting to help construct investment policy for client accounts.

Disciplinary Information

None

Other Business Activities

Not Applicable

Additional Compensation

Not Applicable

Supervision

Mr. Demgen, a founding member of the firm of Causey Demgen & Moore P.C., is an adjunct member of the Compliance Committee. As an investment advisor representative and supervised person, his activities are supervised by the Chief Compliance Officer.

Date of Brochure: June 30, 2020

John R. Connell

Educational Background and Business Experience

Title: Principal

Year of Birth: 1944

Education: BA Economics
MBA Finance
JD Business Law
University of Denver, Denver, Colorado

Background: Principal with Certified Public Accounting Firm of Causey Demgen & Moore P.C. Mr. Connell retired as a shareholder effective June 30, 2013, a position he held since 1990. He has since assumed the role of Principal. Mr. Connell remains a member of the firm's Investment Committee assisting to help construct investment policy for client accounts.

Disciplinary Information

None

Other Business Activities

Not Applicable

Additional Compensation

Not Applicable

Supervision

Mr. Connell is an adjunct member of the Compliance Committee. As an investment advisor representative and supervised person, his activities are supervised by the Chief Compliance Officer.

Date of Brochure: June 30, 2020

William D. Glasso

Educational Background and Business Experience

Title: Officer/Shareholder

Year of Birth: 1972

Education: BA Accounting
State University of New York, Utica, NY

MBA Accounting & Finance
University of Central Florida, Orlando, FL

Background: Officer/Shareholder of the Certified Public Accounting Firm of Causey Demgen & Moore P.C. since 2008. Mr. Glasso began his career with Causey as a consultant in 1997 and subsequently went to work as a financial advisor to state and local governments with Evensen Dodge LLC and then Capital Markets Advisors, LLC, both in New York City. He rejoined Causey in 2006 as a Senior Manager and became a principal in 2008. Among other services, Mr. Glasso provides independent third party consulting services to issuers and underwriters of municipal debt, including financial planning and investment advisory services.

Disciplinary Information

None

Other Business Activities

Not Applicable

Additional Compensation

Not Applicable

Supervision

Mr. Glasso is an adjunct member of the Compliance Committee. As an investment advisor representative and supervised person, his activities are supervised by the Chief Compliance Officer.

Date of Brochure: June 30, 2020

Lyle A. Martine

Educational Background and Business Experience

Title: Officer/Shareholder

Year of Birth: 1964

Education: BA Economics
University of Colorado, Boulder, CO

BS Applied Math
University of Colorado, Boulder, CO

MS Finance
University of Colorado, Denver, CO

Background: Officer/Shareholder of the Certified Public Accounting Firm of Causey Demgen & Moore P.C. since 2013. Prior to joining Causey Demgen & Moore P.C. in 2001, Ms. Martine worked with Safeway Stores for sixteen years. Among other services, Ms. Martine provides independent third party consulting services to issuers and underwriters of municipal debt, including financial planning and investment advisory services.

Disciplinary Information

None

Other Business Activities

Not Applicable

Additional Compensation

Not Applicable

Supervision

Ms. Martine is an adjunct member of the Compliance Committee. As an investment advisor representative and supervised person, her activities are supervised by the Chief Compliance Officer.

Date of Brochure: June 30, 2020

William H. Vincent

Educational Background and Business Experience

Title: Officer/Shareholder

Year of Birth: 1960

Education: BS Business Administration
University of Colorado, Boulder, Colorado

Background: Officer/Shareholder of the Certified Public Accounting Firm of Causey Demgen & Moore P.C. since 1999. Prior to that time, Mr. Vincent was a Manager with the Firm. Mr. Vincent provides services to clients in the tax, litigation support and business valuation areas.

Disciplinary Information

None

Other Business Activities

Not Applicable

Additional Compensation

Not Applicable

Supervision

Mr. Vincent is a supervised person within the firm. Mr. Vincent does not deliver investment advice.

Date of Brochure: June 30, 2020

Robyn T. Schnetzler

Educational Background and Business Experience

Title: Officer/Shareholder

Year of Birth: 1968

Education: BS Accounting
Metropolitan State College of Denver

Background: Officer/Shareholder of the Certified Public Accounting Firm of Causey Demgen & Moore P.C. since 2018. Prior to that time, Ms. Schnetzler was a Manager with the Firm. Ms. Schnetzler provides services to clients in the forensic accounting, litigation support and business valuation areas.

Disciplinary Information

None

Other Business Activities

Not Applicable

Additional Compensation

Not Applicable

Supervision

Ms. Schnetzler is a supervised person within the firm. Ms. Schnetzler does not deliver investment advice.

Date of Brochure: June 30, 2020

Jamey L. Camp-Cavanaugh

Educational Background and Business Experience

Title: Officer/Shareholder

Year of Birth: 1983

Education: BA Accounting, Business Administration with Emphasis in Quantitative Analysis
Mount Union College, Ohio

Background: Officer/Shareholder of the Certified Public Accounting Firm of Causey Demgen & Moore P.C. since 2017. Prior to that time Ms. Camp-Cavanaugh was a Manager with the firm for nine years. Ms. Camp-Cavanaugh provides services to clients primarily in the tax area.

Disciplinary Information

None

Other Business Activities

Not Applicable

Additional Compensation

Not Applicable

Supervision

Ms. Camp-Cavanaugh is a supervised person within the firm. Ms. Camp-Cavanaugh does not deliver investment advice.

Date of Brochure: June 30, 2020

Michael C. Graef

Educational Background and Business Experience

Title: Officer/Shareholder

Year of Birth: 1967

Education: BA Business Economics
University of California, Santa Barbara, CA

Background: Officer/Shareholder of the Certified Public Accounting Firm of Causey Demgen & Moore P.C. since 2006. Prior to that time Mr. Graef was a Manager with the firm for nine years. Mr. Graef provides services to clients primarily in the tax area.

Disciplinary Information

None

Other Business Activities

Not Applicable

Additional Compensation

Not Applicable

Supervision

Mr. Graef is a supervised person within the firm. Mr. Graef does not deliver investment advice.

Date of Brochure: June 30, 2020

Corey J. Zink

Educational Background and Business Experience

Title: Officer/Shareholder

Year of Birth: 1971

Education: BS Business Administration
Colorado State University

Background: Officer/Shareholder of the Certified Public Accounting Firm of Causey Demgen & Moore P.C. since 2016. Prior to that time Mr. Zink was a Director with the firm. Mr. Zink provides services to clients primarily in the tax area.

Disciplinary Information

None

Other Business Activities

Not Applicable

Additional Compensation

Not Applicable

Supervision

Mr. Zink is a supervised person within the firm. Mr. Zink does not deliver investment advice.

Date of Brochure: June 30, 2020

Richard Fleischman

Educational Background and Business Experience

Title: Officer/Shareholder

Year of Birth: 1970

Education: BS Accounting
Northeastern University, Boston, MA

Background: Officer/Shareholder of the Certified Public Accounting Firm of Causey Demgen & Moore P.C. since 2019, at which time Mr. Fleischman joined the firm as a direct-entry partner. Prior to joining Causey Demgen & Moore P.C., Mr. Fleischman was a Director with Haynie & Company for six years, and a manager with AJ Robbins, P.C. for eleven years. Mr. Fleischman provides services to clients in auditing and accounting.

Disciplinary Information:

None

Other Business Activities:

None

Additional Compensation:

None

Supervision:

Mr. Fleischman is a supervised person within the firm. Mr. Fleischman does not deliver investment advice.

Date of Brochure: June 30, 2020