

## FORM ADV PART 2B SUPPLEMENT BROCHURE

1601 Officers Row  
Vancouver, WA 98661  
(360) 823-0477 (Vancouver)  
(503) 210-2219 (Portland)  
(877) 623-0477 (Toll Free)  
(360) 695-5987 (Fax)

[www.fortvancouverim.com](http://www.fortvancouverim.com) • [public@fortvancouverim.com](mailto:public@fortvancouverim.com)

This brochure provides information about the qualifications and business practices of Fort Vancouver Investment Management, LLC. If you have any questions about the contents of this brochure, please contact us at (360) 823-0477 or [public@fortvancouverim.com](mailto:public@fortvancouverim.com). Fort Vancouver Investment Management, LLC is a registered investment advisory firm with the Securities and Exchange Commission. Registration of an investment adviser does not imply any level of skill or training. The information in this brochure has not been approved by the United States Securities and Exchange Commission (SEC) or by any state securities authority.

Additional information about Fort Vancouver Investment Management, LLC is also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov). FVIM's IARD number is 157019.

March 10, 2021

## TABLE OF CONTENTS

COVER PAGE.....	1
TABLE OF CONTENTS .....	2
ROBERT (“ROB”) POOL (CRD #3074685).....	3
HOLLY BREEDEN (CRD #6365891) .....	4
MATTHEW (“MATT”) EBELING (CRD #5382212) .....	5
DESIGNATION REQUIREMENTS.....	6

**Robert (“Rob”) Pool (CRD #3074685)**, born on November 5, 1964, serves as our Investment Manager. Rob founded Fort Vancouver Investment Management, LLC in 2010 with a simple mission; to bring the complex concepts of investing from the academic world into practical application for real life circumstances. Rob’s professional history includes:

01/2012 to Present: Fort Vancouver Investment Management, LLC – Owner

12/2002 to 12/2011: Arcadia Investment Advisors, LLC – Owner

05/2000 to 12/2002: Charles Schwab & Co. – Investment Specialist

12/1998 to 05/2000: American Express Financial Advisors – Financial Planner

### **Education**

Bachelor of Arts in Business Management, George Fox University, 1997

Masters of Science in Financial Services, Institute of Business and Finance, 2003

### **Professional Designations**

Certified Financial Planner (CFP®) - 2002

Certified Funds Specialist (CFS®) - 2005

Chartered Financial Consultant® (ChFC®) – 2004

### **Disciplinary Information**

Rob Pool has never had any disciplinary actions from regulators, courts, or the Certified Financial Planner Board of Standards.

### **Outside Business Activities**

As mentioned in an earlier disclosure, none of FVIM’s advisors are actively engaged in any outside business activities.

### **Additional Compensation**

Rob Pool is dedicated to the investment advisory activities of FVIM’s clients. He does not receive any additional forms of compensation.

### **Supervision**

FVIM’s investment advisors and staff work as a team and each client is assigned a primary service advisor. Rob Pool is responsible for supervising our investment advisors. He can be reached at (360) 823-0477.

**Holly Breeden (CRD #6365891)** was born on July 27, 1973. Holly serves as the Director of Compliance. Her professional history includes:

2012 to Present: Fort Vancouver Investment Management, LLC – Portfolio Analyst & Chief Compliance Officer (Chief Compliance Officer since July 2014)

2006 to 2011: Arcadia Investment Advisors, LLC – Portfolio Analyst

1998 to 2005: Tax Advisors, PLLC – Office Manager

### **Education**

Utah Valley State College (2 years)

### **Professional Designations**

Registered Paraplanner (RP®) now known as Financial Paraplanner Qualified Professional™ (FPQP™) – 2006  
Series 65 Exam – Uniform Investment Advisor State Law Exam, NASD – 2014

### **Disciplinary Information**

Holly Breeden has never had any disciplinary actions from regulators, courts, or the Certified Financial Planner Board of Standards.

### **Outside Business Activities**

As mentioned in an earlier disclosure, none of FVIM's advisors are actively engaged in any outside business activities.

### **Additional Compensation**

Holly Breeden is dedicated to the investment advisory activities of FVIM's clients. She does not receive any additional forms of compensation.

### **Supervision**

FVIM's investment advisors and staff work as a team and each client is assigned a primary service advisor. Rob Pool is responsible for supervising our investment advisors. He can be reached at (360) 823-0477.

**Matthew (“Matt”) Ebeling (CRD #5382212)** was born on January 14, 1976. Matt serves as an Investment Advisor and became a partner in 2019. His professional history includes:

2019 to Present: Fort Vancouver Investment Management, LLC – Owner & Investment Manager

2016 to 2018: Fort Vancouver Investment Management, LLC – Investment Manager

05/2007 – 05/2016: Fisher Investments – Investment Counselor

02/2001 – 04/2007: First Independent Bank Wealth Management & Trust Department – Portfolio Manager and Securities Specialists I & II

10/1999 – 01/2001: CEF, Inc. – Finance Associate

### **Education**

Master’s in Business Administration, Liberty University – 2007

Bachelor of Science in Business Management & Marketing, Pensacola Christian College – 1998

### **Professional Designations**

Series 65 Exam – Uniform Investment Advisor State Law Exam, NASD – 2007

Certified Financial Planner (CFP®) – 2019

### **Disciplinary Information**

Matt Ebeling has never had any disciplinary actions from regulators, courts, or the Certified Financial Planner Board of Standards.

### **Outside Business Activities**

As mentioned in an earlier disclosure, none of FVIM’s advisors are actively engaged in any outside business activities.

### **Additional Compensation**

Matt Ebeling is dedicated to the investment advisory activities of FVIM’s clients. He does not receive any additional forms of compensation.

### **Supervision**

FVIM’s investment advisors and staff work as a team and each client is assigned a primary service advisor. Rob Pool is responsible for supervising our investment advisors. He can be reached at (360) 823-0477.

## Designation Requirements

**CERTIFIED FINANCIAL PLANNER™ (CFP®)**, certificants are individuals who have met the CFP Board's education, examination and experience requirements, have agreed to adhere to high standards of ethical conduct and who complete the CFP Board's biennial certification requirements, including continuing education. The education requirement includes the completion of coursework in investments, insurance, estate planning, employee benefits, retirement planning and tax planning along with a bachelor's degree. The examination is a ten hour exam administered over two days. Certificants also need three years industry experience. Continuing education requirements include 30 hours every two years including 2 hours on the Code of Ethics and/or Practice Standards.

**CERTIFIED FUND SPECIALIST® (CFS®)**, is the oldest designation in the mutual fund industry. Certified funds specialists learn criteria such as alpha, beta, correlation coefficient, first-auto correlation, R-squared, and standard deviation that should be incorporated in the selection process.

With mutual funds training, a CFS® is able to evaluate and compare financial measurements and benchmarks when constructing a portfolio. Modern Portfolio Theory (MPT) is a key part of the program; its components are broken down and detailed in terms the advisor can easily understand and convey to a client. Armed with MPT and other selection criteria learned as part of the mutual fund education, a suitable and efficient portfolio using closed-end, exchange-traded, and open-end funds can be derived.

Practitioners and academics continually update the CFS® materials. Students obtain the best of both worlds—the practical as well as the theoretical. Closed-end funds, ETFs, REITs and UITs are also covered, thereby providing the student with a more rounded education. With this additional investment knowledge, advisors and brokers offer ideas to clients that they would not receive elsewhere.

**Chartered Financial Consultant® (ChFC®)**, has been a mark of excellence for over thirty years and currently requires nine college-level courses, the most of any financial planning credential. Average study time to earn the ChFC® exceeds 450 hours. Required courses cover extensive education and application training in financial planning, income taxation, investments, and estate and retirement planning. Additional electives are chosen from such topics as macroeconomics, financial decisions for retirement, and executive compensation. ChFC® designees must meet experience requirements and adhere to continuing education and ethical standards. The credential is awarded by The American College, a non-profit educator with an 84-year heritage and the highest level of academic accreditation.

**Financial Paraplanner Qualified Professional™ (FPQP™)** Individuals who hold the FPQP™ designation have completed a course of study encompassing the financial planning process; the five disciplines of financial planning; and general financial planning concepts, terminology, and product categories. Additionally, individuals enrolled in the program, after passing the final exam, must complete a three-month long internship program in which they obtain verification from their immediate supervisor or employer documenting their mastery of the following financial planning-related skills:

- adequate verbal and communication skills;
- ability to use at least one type of financial planning software;
- ability to read and extract information for data gathering purposes from a client's financial documents, including insurance policies (life, medical, disability, property/liability), investment records, tax returns, wills/trusts, retirement, and property holding documents;
- ability to construct personal financial statements, including balance sheets (statement of financial position) and income statements; and
- ability to review and analyze information to identify basic strengths and weaknesses in a client's financial situation relating to risk management issues, investment issues, income tax issues, retirement issues, and general issues (e.g., emergency funds, level of debt, budgeting, saving patterns, net worth fluctuations).