



PART 2B OF FORM ADV: BROCHURE SUPPLEMENT

March 27, 2019

This brochure supplement provides information about Jeffrey A. Bernfeld that supplements the Greenspring Advisors brochure. You should have received a copy of that brochure. Please contact Joshua P. Itzoe if you did not receive Greenspring Advisors brochure or if you have any questions about the contents of this supplement.

Additional information about Jeffrey A. Bernfeld is available on the SEC's website at www.adviserinfo.sec.gov.

Jeffrey A. Bernfeld
Personal CRD Number: 6285056
Greenspring Advisors
501 Fairmount Avenue, Suite 102
Towson, MD 21286
Phone: (443) 564-4600

Item 2: Educational Background and Business Experience

Date of Birth: 1972

Education:

University of Texas at Austin; Bachelor of Business Administration, Finance; 1994
Harvard Business School; Masters of Business Administration (MBA); 2000

Business Experience:

Greenspring Advisors, Financial Advisor, 12/2013-Present
DSM Nutritional Products, Marketing Director, 1/2007-12/2013
Extended Overseas Travel, Volunteer Teacher in Ghana, 9/2006-12/2006
General Mills, Inc., Marketing Manager, 08/2000-8/2006

Designations

Jeffrey A. Bernfeld has earned the following designation(s) and is in good standing with the granting authority:

CERTIFIED FINANCIAL PLANNER™; The College for Financial Planning; 2016

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.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill 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:

- i. Continuing Education – Complete 30 hours of continuing education hours 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
- ii. 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.

Item 3: Disciplinary Information

Jeffrey A. Bernfeld has no disciplinary history that is required to be disclosed by the U.S. Securities and Exchange Commission or state regulatory authorities.

Item 4: Other Business Activities



Jeffrey A. Bernfeld spends all of his workweek on advisory matters.

Item 5: Additional Compensation

From time to time, Jeffrey A. Bernfeld may receive expense reimbursement for travel and/or marketing expenses from distributors of investment and/or insurance products. Travel expense reimbursements are typically a result of attendance at due diligence and/or investment training events hosted by product sponsors. Marketing expense reimbursements are typically the result of informal expense sharing arrangements in which product sponsors may underwrite costs incurred for marketing such as advertising, publishing and seminar expenses. Although receipt of these travel and marketing expense reimbursements are not predicated upon specific sales quotas, the product sponsor reimbursements are typically made by those sponsors for whom sales have been made or it is anticipated sales will be made.

Greenspring Advisors and Mr. Bernfeld endeavors at all times to put the interest of their clients ahead of their own interests or those of the advisor's officers, directors, or representatives. However, these arrangements could affect Jeffrey A. Bernfeld's judgment when recommending investment products and present a conflict of interest that may affect his judgment.

Item 6: Supervision

As a representative of Greenspring Advisors, Jeffrey A. Bernfeld is supervised by Josh Itzoe, the firm's Chief Compliance Officer. Josh Itzoe is responsible for ensuring that Jeffrey A. Bernfeld adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Josh Itzoe is (443) 564-4600.



PART 2B OF FORM ADV: BROCHURE SUPPLEMENT

March 27, 2019

This brochure supplement provides information about Robert W. Bogue, Jr. that supplements the Greenspring Advisors brochure. You should have received a copy of that brochure. Please contact Joshua P. Itzoe if you did not receive Greenspring Advisors brochure or if you have any questions about the contents of this supplement.

Additional information about Robert W. Bogue, Jr. is available on the SEC's website at www.adviserinfo.sec.gov.

Robert W. Bogue, Jr.
Personal CRD Number: 809171
Greenspring Advisors
501 Fairmount Avenue, Suite 102
Towson, MD 21286
Phone: (443) 564-4600

Item 2: Educational Background and Business Experience

Date of Birth: 1943

Education:

Yale University; Bachelor of Science, Industrial Administration; 1966
Columbia University; Masters of Business Administration, Finance; 1971

Business Experience:

Greenspring Advisors, Financial Advisor, 4/2014-Present
Calvert Investment Counsel, Principal, 10/1990-3/2014

Designations

Mr. Bogue has earned the following designation(s) and is in good standing with the granting authority:

Chartered Financial Analyst (CFA); 1977

The Chartered Financial Analyst (CFA) charter is a globally respected, graduate-level investment credential established in 1962 and awarded by CFA Institute — the largest global association of investment professionals.



There are currently more than 90,000 CFA charterholders working in 134 countries. To earn the CFA charter, candidates must: 1) pass three sequential, six-hour examinations; 2) have at least four years of qualified professional investment experience; 3) join CFA Institute as members; and 4) commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct.

High Ethical Standards

The CFA Institute Code of Ethics and Standards of Professional Conduct, enforced through an active professional conduct program, require CFA charterholders to:

- Place their clients' interests ahead of their own
- Maintain independence and objectivity
- Act with integrity
- Maintain and improve their professional competence
- Disclose conflicts of interest and legal matters

Global Recognition

Passing the three CFA exams is a difficult feat that requires extensive study (successful candidates report spending an average of 300 hours of study per level). Earning the CFA charter demonstrates mastery of many of the advanced skills needed for investment analysis and decision making in today's quickly evolving global financial industry. As a result, employers and clients are increasingly seeking CFA charterholders—often making the charter a prerequisite for employment.

Additionally, regulatory bodies in 22 countries and territories recognize the CFA charter as a proxy for meeting certain licensing requirements, and more than 125 colleges and universities around the world have incorporated a majority of the CFA Program curriculum into their own finance courses.

Comprehensive and Current Knowledge

The CFA Program curriculum provides a comprehensive framework of knowledge for investment decision making and is firmly grounded in the knowledge and skills used every day in the investment profession. The three levels of the CFA Program test a proficiency with a wide range of fundamental and advanced investment topics, including ethical and professional standards, fixed-income and equity analysis, alternative and derivative investments, economics, financial reporting standards, portfolio management, and wealth planning.

The CFA Program curriculum is updated every year by experts from around the world to ensure that candidates learn the most relevant and practical new tools, ideas, and investment and wealth management skills to reflect the dynamic and complex nature of the profession.

To learn more about the CFA charter, visit www.cfainstitute.org.

Item 3: Disciplinary Information



Robert W. Bogue, Jr. has no disciplinary history that is required to be disclosed by the U.S. Securities and Exchange Commission or state regulatory authorities.

Item 4: Other Business Activities

Robert W. Bogue, Jr. is one of three managers of 7501 Wisconsin Ave., LLC which is an entity that manages rental real estate. He typically spends 2-3 hours per month on this, mostly during securities trading hours.

Item 5: Additional Compensation

From time to time, Robert W. Bogue, Jr. may receive expense reimbursement for travel and/or marketing expenses from distributors of investment and/or insurance products. Travel expense reimbursements are typically a result of attendance at due diligence and/or investment training events hosted by product sponsors. Marketing expense reimbursements are typically the result of informal expense sharing arrangements in which product sponsors may underwrite costs incurred for marketing such as advertising, publishing and seminar expenses. Although receipt of these travel and marketing expense reimbursements are not predicated upon specific sales quotas, the product sponsor reimbursements are typically made by those sponsors for whom sales have been made or it is anticipated sales will be made.

Greenspring Advisors and Robert W. Bogue, Jr. endeavors at all times to put the interest of their clients ahead of their own interests or those of the advisor's officers, directors, or representatives. However, these arrangements could affect Robert W. Bogue, Jr.'s judgment when recommending investment products and present a conflict of interest that may affect his judgment.

Item 6: Supervision

As a representative of Greenspring Advisors, Robert W. Bogue, Jr. is supervised by Josh Itzoe, the firm's Chief Compliance Officer. Josh Itzoe is responsible for ensuring that Robert W. Bogue, Jr. adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Josh Itzoe is (443) 564-4600.



PART 2B OF FORM ADV: BROCHURE SUPPLEMENT

March 27, 2019

This brochure supplement provides information about Molly J. Burton that supplements the Greenspring Advisors brochure. You should have received a copy of that brochure. Please contact Joshua P. Itzoe if you did not receive Greenspring Advisors brochure or if you have any questions about the contents of this supplement.

Additional information about Molly J. Burton is available on the SEC's website at www.adviserinfo.sec.gov.

Molly J. Burton

Personal CRD Number: 6722915
Greenspring Advisors
501 Fairmount Avenue, Suite 102
Towson, MD 21286
Phone: (443) 564-4600

Item 2: Educational Background and Business Experience

Date of Birth: 1990

Education:

Towson University; Bachelor of Science; Finance; 2013

Business Experience:

Greenspring Advisors, Financial Advisor, 9/2017-present
Tobias Financial Advisor, Financial Advisor, 4/2016-9/2017
The Financial Consulate, Associate Financial Planner, 9/2013-4/2016

Designations

CFP® - Certified Financial Planner

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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.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill 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:

- i. Continuing Education – Complete 30 hours of continuing education hours 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
- ii. 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.

Item 3: Disciplinary Information

Molly J. Burton has no disciplinary history that is required to be disclosed by the U.S. Securities and Exchange Commission or state regulatory authorities.

Item 4: Other Business Activities

Molly J. Burton spends all of her workweek on advisory matters.



Item 5: Additional Compensation

From time to time, Molly J. Burton may receive expense reimbursement for travel and/or marketing expenses from distributors of investment and/or insurance products. Travel expense reimbursements are typically a result of attendance at due diligence and/or investment training events hosted by product sponsors. Marketing expense reimbursements are typically the result of informal expense sharing arrangements in which product sponsors may underwrite costs incurred for marketing such as advertising, publishing and seminar expenses. Although receipt of these travel and marketing expense reimbursements are not predicated upon specific sales quotas, the product sponsor reimbursements are typically made by those sponsors for whom sales have been made or it is anticipated sales will be made.

Greenspring Advisors and Molly J. Burton endeavors at all times to put the interest of their clients ahead of their own interests or those of the advisor's officers, directors, or representatives. However, these arrangements could affect Molly J. Burton's judgment when recommending investment products and present a conflict of interest that may affect her judgment.

Item 6: Supervision

As a representative of Greenspring Advisors, Molly J. Burton is supervised by Josh Itzoe, the firm's Chief Compliance Officer. Josh Itzoe is responsible for ensuring that Molly J. Burton adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Josh Itzoe is (443) 564-4600.



PART 2B OF FORM ADV: BROCHURE SUPPLEMENT

March 27, 2019

This brochure supplement provides information about Matthew R. Cellini that supplements the Greenspring Advisors brochure. You should have received a copy of that brochure. Please contact Joshua P. Itzoe if you did not receive Greenspring Advisors brochure or if you have any questions about the contents of this supplement.

Additional information about Matthew R. Cellini is available on the SEC's website at www.adviserinfo.sec.gov.

Matthew R. Cellini
Personal CRD Number: 5966158
Greenspring Advisors
501 Fairmount Avenue
Suite 102
Towson, MD 21286
Phone: (443) 564-4600

Item 2: Educational Background and Business Experience

Date of Birth: 1986

Education:

Stevenson University; BS, Business Administration; 2008

Business Experience:

Greenspring Advisors, Investment Advisor Representative, August 1, 2011 - Present
Mantech International, Business Operations Manager, May 2011 to June 2011
Booz Allen Hamilton, Program Business Manager, June 2010 to June 2011
Lockheed Martin, Proposal Manager, June 2008 to June 2010

Designations:

Matthew R. Cellini has earned the following designation(s) and is in good standing with the granting authority:

Accredited Investment Fiduciary®; Center for Fiduciary Studies; 2011

The AIF designation certifies that the recipient has specialized knowledge of fiduciary standards of care and their application to the investment management process. To receive the AIF designation, individuals must complete a training program, successfully pass a comprehensive, closed-book final examination under the supervision of a proctor and agree to abide by the AIF Code of Ethics. In order to maintain the AIF designation, the individual must annually renew



their affirmation of the AIF Code of Ethics and complete six hours of continuing education credits. The certification is administered by the Center for Fiduciary Studies, LLC (a Fiduciary360 (fi360) company).

Item 3: Disciplinary Information

Matthew R. Cellini has no disciplinary history that is required to be disclosed by the U.S. Securities and Exchange Commission or state regulatory authorities.

Item 4: Other Business Activities

Matthew R. Cellini spends all of his workweek on advisory matters.

Item 5: Additional Compensation

From time to time, Greenspring Advisors and Matthew R. Cellini may receive expense reimbursement for travel and/or marketing expenses from distributors of retirement plan, investment and/or insurance products. Travel expense reimbursements are typically a result of attendance at due diligence and/or investment training events hosted by product sponsors. Marketing expense reimbursements are typically the result of informal expense sharing arrangements in which product sponsors may underwrite costs incurred for marketing such as advertising, publishing and seminar expenses. Although receipt of these travel and marketing expense reimbursements are not predicated upon specific sales quotas, the product sponsor reimbursements are typically made by those sponsors for whom sales have been made or it is anticipated sales will be made. Consequently, in order to continue to obtain these benefits, we may have an incentive to recommend to our clients that they use these distributors.

Greenspring Advisors and Matthew R. Cellini endeavor at all times to put the interest of their clients ahead of their own interests or those of the advisor's officers, directors, or representatives. However, these arrangements could affect Matthew R. Cellini's judgment when recommending investment products and present a conflict of interest that may affect his judgment.

Item 6: Supervision

As a representative of Greenspring Advisors, Matthew R. Cellini is supervised by Josh Itzoe, the firm's Chief Compliance Officer. Josh Itzoe is responsible for ensuring that Matthew R. Cellini adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Josh Itzoe is (443) 564-4600.



PART 2B OF FORM ADV: BROCHURE SUPPLEMENT

March 27, 2019

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Additional information about John Patrick Collins, Jr. is available on the SEC's website at www.adviserinfo.sec.gov.

John Patrick Collins, Jr.
Personal CRD Number: 4295537
Greenspring Advisors
501 Fairmount Avenue, Suite 102
Towson, MD 21286
Phone: (443) 564-4600

Item 2: Educational Background and Business Experience

Date of Birth: 1976

Education:

Pennsylvania State University; BS, Recreation Parks Management, Minor Business Administration;
1999

Business Experience:

Greenspring Advisors, Partner, 3/2006-Present
J.P. Collins & Associates, Inc.; President; from 10/2004 to 3/2006
Merrill Lynch, Pierce, Fenner & Smith Inc.; Financial Consultant; from 10/2000 to 10/2004

Designations

John Patrick Collins, Jr. has earned the following designation(s) and is in good standing with the granting authority:

CERTIFIED FINANCIAL PLANNER™; American College; 2003

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- 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.

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- i. Continuing Education – Complete 30 hours of continuing education hours 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
- ii. 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.

Enrolled Agent; Internal Revenue Service; 2006

An enrolled agent is a person who has earned the privilege of practicing, that is, representing taxpayers, before the Internal Revenue Service. Enrolled agents, like attorneys and certified



public accountants (CPAs), are unrestricted as to which taxpayers they can represent, what types of tax matters they can handle, and which IRS offices they can practice before.

Item 3: Disciplinary Information

John Patrick Collins, Jr. has no disciplinary history that is required to be disclosed by the U.S. Securities and Exchange Commission or state regulatory authorities.

Item 4: Other Business Activities

John Patrick Collins, Jr. spends all of his workweek on advisory matters.

Item 5: Additional Compensation

From time to time, John Patrick Collins, Jr. may receive expense reimbursement for travel and/or marketing expenses from distributors of investment and/or insurance products. Travel expense reimbursements are typically a result of attendance at due diligence and/or investment training events hosted by product sponsors. Marketing expense reimbursements are typically the result of informal expense sharing arrangements in which product sponsors may underwrite costs incurred for marketing such as advertising, publishing and seminar expenses. Although receipt of these travel and marketing expense reimbursements are not predicated upon specific sales quotas, the product sponsor reimbursements are typically made by those sponsors for whom sales have been made or it is anticipated sales will be made.

Greenspring Advisors and John Patrick Collins, Jr. endeavors at all times to put the interest of their clients ahead of their own interests or those of the advisor's officers, directors, or representatives. However, these arrangements could affect John Patrick Collins, Jr.'s judgment when recommending investment products and present a conflict of interest that may affect his judgment.

Item 6: Supervision

As a representative of Greenspring Advisors, John Patrick Collins, Jr. is supervised by Josh Itzoe, the firm's Chief Compliance Officer. Josh Itzoe is responsible for ensuring that John Patrick Collins, Jr. adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Josh Itzoe is (443) 564-4600.



PART 2B OF FORM ADV: BROCHURE SUPPLEMENT

March 27, 2019

This brochure supplement provides information about Andrew Reiley Crosby that supplements the Greenspring Advisors brochure. You should have received a copy of that brochure. Please contact Joshua P. Itzoe if you did not receive Greenspring Advisors brochure or if you have any questions about the contents of this supplement.

Additional information about Andrew Reiley Crosby is available on the SEC's website at www.adviserinfo.sec.gov.

Andrew Reiley Crosby
Personal CRD Number: 2249274
Greenspring Advisors
501 Fairmount Avenue, Suite 102
Towson, MD 21286
Phone: (443) 564-4600

Item 2: Educational Background and Business Experience

Date of Birth: 1991

Education:

Bachelor of Arts Policy Management, Dickinson College – 2013

Business Experience:

Greenspring Advisors; Investment Advisor Representative & Client Service Specialist; from 3/2017 to current

RBC Wealth Management; Investment Associate; from 5/2014 to 3/2017

MassMutual Insurance Company; Agent; from 9/2013 to 5/2014

Dickinson College; Student; 9/2009 to 8/2013

Hereford Middle/Hereford High; Student; 9/2003 to 9/2009

Designations

Andrew Reiley Crosby has earned the following designation(s) and is in good standing with the granting authority:

Accredited Investment Fiduciary® (AIF®): 2017

The AIF Designation certifies that the recipient has specialized knowledge of fiduciary standards of care and their application to the investment management process. To receive the AIF Designation, the individual must meet prerequisite criteria based on a combination of education, relevant industry experience, and/or ongoing professional development, complete a training program, successfully pass a comprehensive, closed-book final examination under the supervision of a proctor and agree to abide by the Code of Ethics and Conduct Standards. In



order to maintain the AIF Designation, the individual must annually attest to the Code of Ethics and Conduct Standards, and accrue and report a minimum of six hours of continuing education. The Designation is administered by the Center for Fiduciary Studies, the standards-setting body of fi360.

Chartered Retirement Plans SpecialistSM (CRPS[®]): 2018

Individuals who hold the CRPS[®] designation have completed a course of study encompassing design, installation, maintenance, and administration of retirement plans. The program is designed for approximately 120-150 hours of self-study. The program is self-paced and must be completed within one year from enrollment.

Item 3: Disciplinary Information

Andrew Reiley Crosby has no disciplinary history that is required to be disclosed by the U.S. Securities and Exchange Commission or state regulatory authorities.

Item 4: Other Business Activities

Andrew Reiley Crosby spends all of his workweek on advisory matters.

Item 5: Additional Compensation

From time to time, Andrew Reiley Crosby may receive expense reimbursement for travel and/or marketing expenses from distributors of investment and/or insurance products. Travel expense reimbursements are typically a result of attendance at due diligence and/or investment training events hosted by product sponsors. Marketing expense reimbursements are typically the result of informal expense sharing arrangements in which product sponsors may underwrite costs incurred for marketing such as advertising, publishing and seminar expenses. Although receipt of these travel and marketing expense reimbursements are not predicated upon specific sales quotas, the product sponsor reimbursements are typically made by those sponsors for whom sales have been made or it is anticipated sales will be made.

Greenspring Advisors and Andrew Reiley Crosby endeavor at all times to put the interest of their clients ahead of their own interests or those of the advisor's officers, directors, or representatives. However, these arrangements could affect Andrew Reiley Crosby's judgment when recommending investment products and present a conflict of interest that may affect his judgment.

Item 6: Supervision

As a representative of Greenspring Advisors, Andrew Reiley Crosby is supervised by Joshua P. Itzoe, the firm's Chief Compliance Officer. Joshua P. Itzoe is responsible for ensuring that Andrew Reiley Crosby adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's



GREENSPRING A D V I S O R S

Corporate Retirement | Wealth Management

Code of Ethics and compliance manual. The phone number for Joshua P. Itzoe is (443) 564-4600.



PART 2B OF FORM ADV: BROCHURE SUPPLEMENT

April 12, 2019

This brochure supplement provides information about Owen T. Demmerly that supplements the Greenspring Advisors brochure. You should have received a copy of that brochure. Please contact Joshua P. Itzoe if you did not receive Greenspring Advisors brochure or if you have any questions about the contents of this supplement.

Additional information about Steven Austin Main is available on the SEC's website at www.adviserinfo.sec.gov.

Owen T. Demmerly
Personal CRD Number: 6692614
Greenspring Advisors
501 Fairmount Avenue, Suite 102
Towson, MD 21286
Phone: (443) 564-4600

Item 2: Educational Background and Business Experience

Date of Birth: 1994

Education:

Goucher College: BA, Economics – 2016

Business Experience:

Greenspring Advisors, Financial Associate, 7/2016 - Present
Greenspring Advisors, Intern, 6/2015 - 7/2016

Designations

CFP® - Certified Financial Planner

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- 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.

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- i. Continuing Education – Complete 30 hours of continuing education hours 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
- ii. 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.

Item 3: Disciplinary Information

Owen T. Demmerly has no disciplinary history that is required to be disclosed by the U.S. Securities and Exchange Commission or state regulatory authorities.

Item 4: Other Business Activities

Owen T. Demmerly spends all of his workweek on advisory matters.

Item 5: Additional Compensation



From time to time, Owen T. Demmerly may receive expense reimbursement for travel and/or marketing expenses from distributors of investment and/or insurance products. Travel expense reimbursements are typically a result of attendance at due diligence and/or investment training events hosted by product sponsors. Marketing expense reimbursements are typically the result of informal expense sharing arrangements in which product sponsors may underwrite costs incurred for marketing such as advertising, publishing and seminar expenses. Although receipt of these travel and marketing expense reimbursements are not predicated upon specific sales quotas, the product sponsor reimbursements are typically made by those sponsors for whom sales have been made or it is anticipated sales will be made.

Greenspring Advisors and Owen T. Demmerly endeavors at all times to put the interest of their clients ahead of their own interests or those of the advisor's officers, directors, or representatives. However, these arrangements could affect Owen T. Demmerly's judgment when recommending investment products and present a conflict of interest that may affect his judgment.

Item 6: Supervision

As a representative of Greenspring Advisors, Owen T. Demmerly is supervised by Josh Itzoe, the firm's Chief Compliance Officer. Josh Itzoe is responsible for ensuring that Owen T. Demmerly adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Josh Itzoe is (443) 564-4600.



PART 2B OF FORM ADV: BROCHURE SUPPLEMENT

March 27, 2019

This brochure supplement provides information about Molly R. Goetz that supplements the Greenspring Advisors brochure. You should have received a copy of that brochure. Please contact Joshua P. Itzoe if you did not receive Greenspring Advisors brochure or if you have any questions about the contents of this supplement.

Additional information about Molly R. Goetz is available on the SEC's website at www.adviserinfo.sec.gov.

Molly R. Goetz

Personal CRD Number: 2680481
Greenspring Advisors
501 Fairmount Avenue, Suite 102
Towson, MD 21286
Phone: (443) 564-4600

Item 2: Educational Background and Business Experience

Date of Birth: 1972

Education:

Loyola College; MBA, Finance; 2005
University of Virginia; BA, English & Religious Studies; 1995

Business Experience:

Greenspring Advisors, 01/2012-Present
JSG Heron-Harbor, LLC; from 05/2005 to 01/2012
Questmark Partners; from 04/2002 to 06/2004

Designations

CERTIFIED FINANCIAL PLANNER™; College For Financial Planning; 2016

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.



To attain the right to use the CFP® marks, an individual must satisfactorily fulfill 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:

- i. Continuing Education – Complete 30 hours of continuing education hours 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
- ii. 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.

Item 3: Disciplinary Information

Molly R. Goetz has no disciplinary history that is required to be disclosed by the U.S. Securities and Exchange Commission or state regulatory authorities.

Item 4: Other Business Activities

Molly R. Goetz spends all of her workweek on advisory matters.

Item 5: Additional Compensation



From time to time, Molly R. Goetz may receive expense reimbursement for travel and/or marketing expenses from distributors of investment and/or insurance products. Travel expense reimbursements are typically a result of attendance at due diligence and/or investment training events hosted by product sponsors. Marketing expense reimbursements are typically the result of informal expense sharing arrangements in which product sponsors may underwrite costs incurred for marketing such as advertising, publishing and seminar expenses. Although receipt of these travel and marketing expense reimbursements are not predicated upon specific sales quotas, the product sponsor reimbursements are typically made by those sponsors for whom sales have been made or it is anticipated sales will be made.

Greenspring Advisors and Molly R. Goetz endeavor at all times to put the interest of their clients ahead of their own interests or those of the advisor's officers, directors, or representatives. However, these arrangements could affect Molly R. Goetz's judgment when recommending investment products and present a conflict of interest that may affect her judgment.

Item 6: Supervision

As a representative of Greenspring Advisors, Molly R. Goetz is supervised by Josh Itzoe, the firm's Chief Compliance Officer. Josh Itzoe is responsible for ensuring that Molly R. Goetz adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Josh Itzoe is (443) 564-4600.



PART 2B OF FORM ADV: BROCHURE SUPPLEMENT

March 27, 2019

This brochure supplement provides information about Gregory Alan Hobson that supplements the Greenspring Advisors brochure. You should have received a copy of that brochure. Please contact Joshua P. Itzoe if you did not receive Greenspring Advisors brochure or if you have any questions about the contents of this supplement.

Additional information about Gregory Alan Hobson is available on the SEC's website at www.adviserinfo.sec.gov.

Gregory Alan Hobson
Personal CRD Number: 2608188
Greenspring Advisors
501 Fairmount Avenue, Suite 102
Towson, MD 21286
Phone: (443) 564-4600

Item 2: Educational Background and Business Experience

Date of Birth: 1972

Education:

Bachelor of Arts Political Science, University of Delaware – 1994

Business Experience:

Greenspring Advisors; Partner & Senior Financial Advisor; from 3/2017 to current
RBC Wealth Management; SVP & Financial Advisor; from 3/2009 to 3/2017
Ferris, Baker Watts incorporated; V.P. Investments – Retirement Plan Coordinator; from 2/1997 to 3/2009

Designations

Gregory Alan Hobson has earned the following designation(s) and is in good standing with the granting authority:

CERTIFIED FINANCIAL PLANNER™; Kaplan Financial; 2014

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.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill 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:

- i. Continuing Education – Complete 30 hours of continuing education hours 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
- ii. 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.

Accredited Investment Fiduciary® (AIF®): 2010

The AIF Designation certifies that the recipient has specialized knowledge of fiduciary standards of care and their application to the investment management process. To receive the AIF Designation, the individual must meet prerequisite criteria based on a combination of education, relevant industry experience, and/or ongoing professional development, complete a training program, successfully pass a comprehensive, closed-book final examination under the supervision of a proctor and agree to abide by the Code of Ethics and Conduct Standards. In order to maintain the AIF Designation, the individual must annually attest to the Code of Ethics



and Conduct Standards, and accrue and report a minimum of six hours of continuing education. The Designation is administered by the Center for Fiduciary Studies, the standards-setting body of fi360.

Item 3: Disciplinary Information

Gregory Alan Hobson has no disciplinary history that is required to be disclosed by the U.S. Securities and Exchange Commission or state regulatory authorities.

Item 4: Other Business Activities

Gregory Alan Hobson spends all of his workweek on advisory matters.

Item 5: Additional Compensation

From time to time, Gregory Alan Hobson may receive expense reimbursement for travel and/or marketing expenses from distributors of investment and/or insurance products. Travel expense reimbursements are typically a result of attendance at due diligence and/or investment training events hosted by product sponsors. Marketing expense reimbursements are typically the result of informal expense sharing arrangements in which product sponsors may underwrite costs incurred for marketing such as advertising, publishing and seminar expenses. Although receipt of these travel and marketing expense reimbursements are not predicated upon specific sales quotas, the product sponsor reimbursements are typically made by those sponsors for whom sales have been made or it is anticipated sales will be made.

Greenspring Advisors and Gregory Alan Hobson endeavor at all times to put the interest of their clients ahead of their own interests or those of the advisor's officers, directors, or representatives. However, these arrangements could affect Gregory Alan Hobson's judgment when recommending investment products and present a conflict of interest that may affect his judgment.

Item 6: Supervision

As a representative of Greenspring Advisors, Gregory Alan Hobson is supervised by Joshua P. Itzoe, the firm's Chief Compliance Officer. Joshua P. Itzoe is responsible for ensuring that Gregory Alan Hobson adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Joshua P. Itzoe is (443) 564-4600.



PART 2B OF FORM ADV: BROCHURE SUPPLEMENT

March 27, 2019

This brochure supplement provides information about Joshua P. Itzoe that supplements the Greenspring Advisors brochure. You should have received a copy of that brochure. Please contact Joshua P. Itzoe if you did not receive Greenspring Advisors brochure or if you have any questions about the contents of this supplement.

Additional information about Joshua P. Itzoe is available on the SEC's website at www.adviserinfo.sec.gov.

Joshua P. Itzoe

Personal CRD Number: 4764403
Greenspring Advisors
501 Fairmount Avenue, Suite 102
Towson, MD 21286
Phone: (443) 564-4600

Item 2: Educational Background and Business Experience

Date of Birth: 1974

Education:

Wake Forest University; BA, History; 1997

Business Experience:

Greenspring Advisors; Partner; from 3/1/2006 to current
J.P. Collins & Associates, Inc.; Principal; from 9/30/2005 to 3/1/2006
Morgan Stanley; Financial Advisor; from 1/1/2004 to 9/29/2005
Impact Labs; Director of Channel Development; from 1/1/2003 to 1/1/2004
Dataprise Inc.; Account Executive; from 8/1/2003 to 1/1/2004
Citrix Systems; Business Development Manager; from 1/1/1999 to 8/1/2003

Designations

Joshua P. Itzoe has earned the following designation(s) and is in good standing with the granting authority:

CERTIFIED FINANCIAL PLANNER™; American College; 2006

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.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill 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:

- i. Continuing Education – Complete 30 hours of continuing education hours 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
- ii. 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.

Accredited Investment Fiduciary® (AIF®): 2007

The AIF Designation certifies that the recipient has specialized knowledge of fiduciary standards of care and their application to the investment management process. To receive the AIF Designation, the individual must meet prerequisite criteria based on a combination of education, relevant industry experience, and/or ongoing professional development, complete a training



program, successfully pass a comprehensive, closed-book final examination under the supervision of a proctor and agree to abide by the Code of Ethics and Conduct Standards. In order to maintain the AIF Designation, the individual must annually attest to the Code of Ethics and Conduct Standards, and accrue and report a minimum of six hours of continuing education. The Designation is administered by the Center for Fiduciary Studies, the standards-setting body of fi360.

Item 3: Disciplinary Information

Joshua P. Itzoe has no disciplinary history that is required to be disclosed by the U.S. Securities and Exchange Commission or state regulatory authorities.

Item 4: Other Business Activities

Joshua P. Itzoe spends all of his workweek on advisory matters.

Item 5: Additional Compensation

From time to time, Joshua P. Itzoe may receive expense reimbursement for travel and/or marketing expenses from distributors of investment and/or insurance products. Travel expense reimbursements are typically a result of attendance at due diligence and/or investment training events hosted by product sponsors. Marketing expense reimbursements are typically the result of informal expense sharing arrangements in which product sponsors may underwrite costs incurred for marketing such as advertising, publishing and seminar expenses. Although receipt of these travel and marketing expense reimbursements are not predicated upon specific sales quotas, the product sponsor reimbursements are typically made by those sponsors for whom sales have been made or it is anticipated sales will be made.

Greenspring Advisors and Joshua P. Itzoe endeavor at all times to put the interest of their clients ahead of their own interests or those of the advisor's officers, directors, or representatives.

However, these arrangements could affect Joshua P. Itzoe's judgment when recommending investment products and present a conflict of interest that may affect his judgment.

Item 6: Supervision

As a representative of Greenspring Advisors, Joshua P. Itzoe is supervised by Joshua P. Itzoe, the firm's Chief Compliance Officer. Joshua P. Itzoe is responsible for ensuring that Joshua P. Itzoe adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Joshua P. Itzoe is (443) 564-4600.



PART 2B OF FORM ADV: BROCHURE SUPPLEMENT

March 27, 2019

This brochure supplement provides information about Steven Austin Main that supplements the Greenspring Advisors brochure. You should have received a copy of that brochure. Please contact Joshua P. Itzoe if you did not receive Greenspring Advisors brochure or if you have any questions about the contents of this supplement.

Additional information about Steven Austin Main is available on the SEC's website at www.adviserinfo.sec.gov.

Steven Austin Main
Personal CRD Number: 5899157
Greenspring Advisors
501 Fairmount Avenue, Suite 102
Towson, MD 21286
Phone: (443) 564-4600

Item 2: Educational Background and Business Experience

Date of Birth: 1986

Education:

MSc Management (Finance), Durham University - 2010
BA Mathematics & Business Management, Goucher College – 2009

Business Experience:

Greenspring Advisors, Investment Associate, 12/2018 - Present
1919 Investment Counsel, Senior Portfolio Analyst, 09/2012 - 11/2018
Morgan Stanley, Security Based Lending Analyst, 03/2011 - 08/2012
Student, 03/2008 - 03/2011

Designations

Not applicable.

Item 3: Disciplinary Information

Steven Austin Main has no disciplinary history that is required to be disclosed by the U.S. Securities and Exchange Commission or state regulatory authorities.

Item 4: Other Business Activities



Steven Austin Main spends all of his workweek on advisory matters.

Item 5: Additional Compensation

From time to time, Steven Austin Main may receive expense reimbursement for travel and/or marketing expenses from distributors of investment and/or insurance products. Travel expense reimbursements are typically a result of attendance at due diligence and/or investment training events hosted by product sponsors. Marketing expense reimbursements are typically the result of informal expense sharing arrangements in which product sponsors may underwrite costs incurred for marketing such as advertising, publishing and seminar expenses. Although receipt of these travel and marketing expense reimbursements are not predicated upon specific sales quotas, the product sponsor reimbursements are typically made by those sponsors for whom sales have been made or it is anticipated sales will be made.

Greenspring Advisors and Steven Austin Main endeavors at all times to put the interest of their clients ahead of their own interests or those of the advisor's officers, directors, or representatives. However, these arrangements could affect Steven Austin Main's judgment when recommending investment products and present a conflict of interest that may affect his judgment.

Item 6: Supervision

As a representative of Greenspring Advisors, Steven Austin Main is supervised by Josh Itzoe, the firm's Chief Compliance Officer. Josh Itzoe is responsible for ensuring that Steven Austin Main adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Josh Itzoe is (443) 564-4600.



PART 2B OF FORM ADV: BROCHURE SUPPLEMENT

March 27, 2019

This brochure supplement provides information about Daniel A. Mong that supplements the Greenspring Advisors brochure. You should have received a copy of that brochure. Please contact Joshua P. Itzoe if you did not receive Greenspring Advisors brochure or if you have any questions about the contents of this supplement.

Additional information about Daniel A. Mong is available on the SEC's website at www.adviserinfo.sec.gov.

Daniel A. Mong
Personal CRD Number: 6857417
Greenspring Advisors
501 Fairmount Avenue, Suite 102
Towson, MD 21286
Phone: (443) 564-4600

Item 2: Educational Background and Business Experience

Date of Birth: 1991

Education:

Towson University; Bachelor of Science, Economics; 2015
Harford Community College; Associate of Science; 2013

Business Experience:

Greenspring Advisors, Financial Associate, 9/2017-Present
Silberstein Insurance Group, Financial Analyst, 2/2016-9/2017
Eastern Savings Bank, Compliance Analyst, 5/2015-1/2016
Eastern Savings Bank, Personal Banker, 10/2013-5/2015

Designations

Not applicable.

Item 3: Disciplinary Information

Daniel A. Mong has no disciplinary history that is required to be disclosed by the U.S. Securities and Exchange Commission or state regulatory authorities.

Item 4: Other Business Activities



Daniel A. Mong spends all of his workweek on advisory matters.

Item 5: Additional Compensation

From time to time, Daniel A. Mong may receive expense reimbursement for travel and/or marketing expenses from distributors of investment and/or insurance products. Travel expense reimbursements are typically a result of attendance at due diligence and/or investment training events hosted by product sponsors. Marketing expense reimbursements are typically the result of informal expense sharing arrangements in which product sponsors may underwrite costs incurred for marketing such as advertising, publishing and seminar expenses. Although receipt of these travel and marketing expense reimbursements are not predicated upon specific sales quotas, the product sponsor reimbursements are typically made by those sponsors for whom sales have been made or it is anticipated sales will be made.

Greenspring Advisors and Mr. Mong endeavors at all times to put the interest of their clients ahead of their own interests or those of the advisor's officers, directors, or representatives. However, these arrangements could affect Daniel A. Mong's judgment when recommending investment products and present a conflict of interest that may affect his judgment.

Item 6: Supervision

As a representative of Greenspring Advisors, Daniel A. Mong is supervised by Josh Itzoe, the firm's Chief Compliance Officer. Josh Itzoe is responsible for ensuring that Daniel A. Mong adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Josh Itzoe is (443) 564-4600.



PART 2B OF FORM ADV: BROCHURE SUPPLEMENT

April 5, 2019

The brochure supplement provides information about Steven Austin Main that supplements the Greenspring Advisors brochure. You should have received a copy of that brochure. Please contact Joshua P. Itzoe if you did not receive Greenspring Advisors brochure or if you have any questions about the contents of their supplement.

Additional information about Steven Austin Main is available on the SEC's website at www.adviserinfo.sec.gov.

Cindy Yorlenis Mota Corona
Personal CRD Number: 6081889
Greenspring Advisors
650 From Road Suite 158
Paramus, NJ 07652
Phone: 551-249-1190

Item 2: Educational Background and Business Experience

Date of Birth: 1989

Education:

Bachelor of Science Financial Planning, William Paterson University – 2012

Business Experience:

Greenspring Advisors, Investment Associate, 4/2019 - Present
Quadrant Capital Management, Senior Financial Planning Analyst, 05/2014 – 1/2019
The Vanguard Group, High Net-worth Brokerage Service Specialist, 06/2012 - 05/2014
Bank of America, Teller, 08/2007 - 05/2012

Designations

CFP® - Certified Financial Planner

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conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill 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:

- i. Continuing Education – Complete 30 hours of continuing education hours 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
- ii. 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.

Item 3: Disciplinary Information

Cindy Yorlenis Mota Corona has no disciplinary history that is required to be disclosed by the U.S. Securities and Exchange Commission or state regulatory authorities.

Item 4: Other Business Activities

Cindy Yorlenis Mota Corona spends all of her workweek on advisory matters.



Item 5: Additional Compensation

From time to time, Cindy Yorlenis Mota Corona may receive expense reimbursement for travel and/or marketing expenses from distributors of investment and/or insurance products. Travel expense reimbursements are typically a result of attendance at due diligence and/or investment training events hosted by product sponsors. Marketing expense reimbursements are typically the result of informal expense sharing arrangements in which product sponsors may underwrite costs incurred for marketing such as advertising, publishing and seminar expenses. Although receipt of these travel and marketing expense reimbursements are not predicated upon specific sales quotas, the product sponsor reimbursements are typically made by those sponsors for whom sales have been made or it is anticipated sales will be made.

Greenspring Advisors and Cindy Yorlenis Mota Corona endeavors at all times to put the interest of their clients ahead of their own interests or those of the advisor's officers, directors, or representatives. However, these arrangements could affect Cindy Yorlenis Mota Corona's judgment when recommending investment products and present a conflict of interest that may affect her judgment.

Item 6: Supervision

As a representative of Greenspring Advisors, Cindy Yorlenis Mota Corona is supervised by Josh Itzoe, the firm's Chief Compliance Officer. Josh Itzoe is responsible for ensuring that Cindy Yorlenis Mota Corona adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Josh Itzoe is (443) 564-4600.



PART 2B OF FORM ADV: BROCHURE SUPPLEMENT

March 27, 2019

This brochure supplement provides information about Gregory Plechner that supplements the Greenspring Advisors brochure. You should have received a copy of that brochure. Please contact Joshua P. Itzoe if you did not receive Greenspring Advisors brochure or if you have any questions about the contents of this supplement.

Additional information about Gregory Plechner is available on the SEC's website at www.adviserinfo.sec.gov.

Gregory Plechner
Personal CRD Number: 2101597
Greenspring Advisors
650 From Road, Suite 158
Paramus, NJ 07652
Phone: (551) 249-1190

Item 2: Educational Background and Business Experience

Date of Birth: 1968

Education:

State University of New York (SUNY); Bachelor of Science, Business Economics, Honors in Academic Area

Business Experience:

Greenspring Advisors, Partner & Senior Financial Advisor, 5/2018-Present
Modera Wealth Management, LLC, Principal, Wealth Manager, 1/2011-5/2018
Modera Wealth Management, Principal, 6/2004-12/2010
Citigroup Global Markets Inc., Divisional Director, Financial Planning Services, 5/1998-5/2004
Wall Street Access, Director of Financial Planning Services, 6/1995-4/1998
Prudential Securities Incorporated, Assistant Vice President, 9/1991-5/1995

Designations

Gregory Plechner has earned the following designation(s) and is in good standing with the granting authority:

CERTIFIED FINANCIAL PLANNER™; The College for Financial Planning, 1998



Corporate Retirement | Wealth Management

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- 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:

- i. Continuing Education – Complete 30 hours of continuing education hours 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
- ii. 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.

Chartered Financial Consultant®; The American College; 2000



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The ChFC® designation is awarded by The American College. The Chartered Financial Consultant® (ChFC®) designation program focuses on the comprehensive financial planning process as an organized way to collect and analyze information on a client's total financial situation; to identify and establish specific financial goals; and to formulate, implement, and monitor a comprehensive plan to achieve those goals.

ChFC® certification requirements:

- Completion of 6 required courses and 2 elective courses.
- Three-year qualifying full-time work experience.
- 30 hours of continuing education every two years.

Chartered Life Underwriter®; The American College; 2001

The CLU® designation is awarded by The American College. The Chartered Life Underwriter® (CLU®) designation is the professional credential for persons involved in the protection, accumulation, preservation, and distribution of the economic values of human life.

CLU® certification requirements:

- Completion of 5 required courses and 3 elective courses.
- Three-year qualifying full-time work experience.
- 30 hours of continuing education every two years.

Chartered Advisor for Senior Living®; The American College; 2004

The CASL® designation is awarded by The American College. The Chartered Advisor for Senior Living® (CASL®) designation is a rigorous credential in the senior and retirement planning space, with curriculum that covers wealth accumulation, income distribution, and estate planning strategies for those preparing for or in retirement.

CASL® certification requirements:

- Completion of 5 required courses.
- Three-year qualifying full-time work experience.
- 15 hours of continuing education every two years.

Enrolled Agent; Internal Revenue Service; 2018

An enrolled agent is a person who has earned the privilege of practicing, that is, representing taxpayers, before the Internal Revenue Service. Enrolled agents, like attorneys and certified public accountants (CPAs), are unrestricted as to which taxpayers they can represent, what types of tax matters they can handle, and which IRS offices they can practice before.

Item 3: Disciplinary Information

Gregory Plechner has no disciplinary history that is required to be disclosed by the U.S. Securities and Exchange Commission or state regulatory authorities.

Item 4: Other Business Activities



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Gregory Plechner spends all of his workweek on advisory matters.

Item 5: Additional Compensation

From time to time, Gregory Plechner may receive expense reimbursement for travel and/or marketing expenses from distributors of investment and/or insurance products. Travel expense reimbursements are typically a result of attendance at due diligence and/or investment training events hosted by product sponsors. Marketing expense reimbursements are typically the result of informal expense sharing arrangements in which product sponsors may underwrite costs incurred for marketing such as advertising, publishing and seminar expenses. Although receipt of these travel and marketing expense reimbursements are not predicated upon specific sales quotas, the product sponsor reimbursements are typically made by those sponsors for whom sales have been made or it is anticipated sales will be made.

Greenspring Advisors and Mr. Plechner endeavors at all times to put the interest of their clients ahead of their own interests or those of the advisor's officers, directors, or representatives. However, these arrangements could affect Gregory Plechner's judgment when recommending investment products and present a conflict of interest that may affect his judgment.

Item 6: Supervision

As a representative of Greenspring Advisors, Gregory Plechner is supervised by Josh Itzoe, the firm's Chief Compliance Officer. Josh Itzoe is responsible for ensuring that Gregory Plechner adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Josh Itzoe is (443) 564-4600.



PART 2B OF FORM ADV: BROCHURE SUPPLEMENT

March 27, 2019

This brochure supplement provides information about Christian T. Stanley that supplements the Greenspring Advisors brochure. You should have received a copy of that brochure. Please contact Joshua P. Itzoe if you did not receive Greenspring Advisors brochure or if you have any questions about the contents of this supplement.

Additional information about Christian T. Stanley is available on the SEC's website at www.adviserinfo.sec.gov.

Christian T. Stanley
Personal CRD Number: 6495951
Greenspring Advisors
501 Fairmount Avenue, Suite 102
Towson, MD 21286
Phone: (443) 564-4600

Item 2: Educational Background and Business Experience

Date of Birth: 1989

Education:

York College of Pennsylvania; Bachelor of Science, Business Administration; 2011

Business Experience:

Greenspring Advisors, Financial Advisor, 5/2015-Present
Milwaukee Tool, Market Manager, Jobsite Solutions, 5/2014-5/2015
Techtronic Industries, Regional Manager, 08/2013-05/2014
Techtronic Industries, Territory Manager, 05/2012-08/2013
Techtronic Industries, Field Sales Representative, 06/2011-05/2012

Designations

Christian T. Stanley has earned the following designation(s) and is in good standing with the granting authority:

Chartered Retirement Plan Specialist® (CRPS®): 2017

Individuals who hold the CRPS® designation have completed a course of study encompassing design, installation, maintenance, and administration of retirement plans. The program is designed for approximately 120-150 hours of self-study. The program is self-paced and must be completed within one year from enrollment.



Accredited Investment Fiduciary® (AIF®): 2017

The AIF Designation certifies that the recipient has specialized knowledge of fiduciary standards of care and their application to the investment management process. To receive the AIF Designation, the individual must meet prerequisite criteria based on a combination of education, relevant industry experience, and/or ongoing professional development, complete a training program, successfully pass a comprehensive, closed-book final examination under the supervision of a proctor and agree to abide by the Code of Ethics and Conduct Standards. In order to maintain the AIF Designation, the individual must annually attest to the Code of Ethics and Conduct Standards, and accrue and report a minimum of six hours of continuing education. The Designation is administered by the Center for Fiduciary Studies, the standards-setting body of fi360.

Item 3: Disciplinary Information

Christian T. Stanley has no disciplinary history that is required to be disclosed by the U.S. Securities and Exchange Commission or state regulatory authorities.

Item 4: Other Business Activities

Christian T. Stanley spends all of his workweek on advisory matters.

Item 5: Additional Compensation

From time to time, Christian T. Stanley may receive expense reimbursement for travel and/or marketing expenses from distributors of investment and/or insurance products. Travel expense reimbursements are typically a result of attendance at due diligence and/or investment training events hosted by product sponsors. Marketing expense reimbursements are typically the result of informal expense sharing arrangements in which product sponsors may underwrite costs incurred for marketing such as advertising, publishing and seminar expenses. Although receipt of these travel and marketing expense reimbursements are not predicated upon specific sales quotas, the product sponsor reimbursements are typically made by those sponsors for whom sales have been made or it is anticipated sales will be made.

Greenspring Advisors and Christian T. Stanley endeavors at all times to put the interest of their clients ahead of their own interests or those of the advisor's officers, directors, or representatives. However, these arrangements could affect Christian T. Stanley's judgment when recommending investment products and present a conflict of interest that may affect his judgment.

Item 6: Supervision

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