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**March 25, 2024**

**FORM ADV PART 2B BROCHURE SUPPLEMENT**

**Pamela Stamper–Brandt, CFP<sup>®</sup>, AIF<sup>®</sup>**

This brochure supplement provides information about Pamela Stamper–Brandt that supplements the Sustainable Advisors Alliance, LLC brochure. You should have received a copy of that brochure. Contact us at (918) 408-7981 if you did not receive Sustainable Advisors Alliance, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Pamela Stamper–Brandt CRD # 729119 is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2 Educational Background and Business Experience

**Pamela Stamper–Brandt, CFP®, AIF®,**

*Year of Birth:* 1954

### *Formal Education After High School:*

- 1976 – Appalachian State University, Bachelor of Science, Mathematics

### *Business Background:*

- Sustainable Advisors Alliance LLC, Investment Advisor Representative, 04/2021 - Present
- Portfolio Resources Group, Inc., Registered Representative, 01/2008 – 04/2021
- Portfolio Resources Advisor Group, Investment Advisor Representative, 01/2008 – 04/2021
- College for Financial Planning, Adjunct Faculty Instructor, 07/1998 – 03/2017
- Financial West Group, Registered Representative, 01/2006 – 12/2007

Pamela Stamper-Brandt has focused on providing Sustainable, Responsible, Impact (SRI) investment portfolio management strategies that integrates her client's chosen Environmental, Social & Governance (ESG) impact preferences since 1999. For portfolio construction, Pamela either works through tenured third-party asset (TPA) managers who have a proven track record of portfolio management with ongoing due diligence or personally manages a limited number of special accounts relying upon subscription and/or custodian research analysis for asset allocation decisions. In either case, Pamela works with her clients to identify their goals, risk tolerance, time horizon and objectives used in building an Investment Policy Statement that includes details on fees and expenses, investment philosophy, and strategy to construct a custom portfolio. She believes in the importance of broad diversification and strategic rebalancing. While the selected TPA managers are responsible for the initial and ongoing due diligence on any sub-advisers they use, Pamela reviews the TPA investment management platforms and client portfolios at least annually to ensure that portfolios are aligned with a client's stated objectives and risk tolerance and reviews the ongoing viability of TPA. Pamela reviews personally managed accounts at least annually using the same criteria as used for TPAs.

As an Accredited Investment Fiduciary™, Pamela fully embraces the firm's fiduciary responsibility to its clients and believes in providing full transparency involving clients' portfolio management.

### **Professional Designations**

**CERTIFIED FINANCIAL PLANNER™**, CFP® and federally registered CFP (with flame design) marks (collectively, the "CFP® marks") are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board").

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients. Currently, more than 71,000 individuals have obtained CFP® certification in the United States.

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:

- 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
- 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®):** The professional designations awarded by fi360® demonstrate the focus on all the components of a comprehensive investment process, related fiduciary standards of care, and commitment to excellence. AIF designees undergo an initial training program and are required to complete annual continuing education. Such designees also pledge to abide by the fi360 Code of Ethics.

Those who earn the AIF designation successfully complete a specialized program on investment fiduciary standards of care and pass a comprehensive examination. AIF designees demonstrate a thorough understanding of fi360’s Prudent Practices for investment advisors and stewards.

Upon successful completion of the program, participants are able to:

- Articulate the basis for, and benefits of, fiduciary standards of excellence according to fi360.
- Identify when an individual or organization may be deemed to have fiduciary status.
- Identify the legal standards that require fiduciaries to prudently manage investment decisions.
- Apply the practices that define a prudent investment process for investment stewards and advisors and recognize the practices for investment managers.
- Strengthen fiduciary policies and procedures.

### **Item 3 Disciplinary Information**

Form ADV Part 2B requires disclosure of certain criminal or civil actions, administrative proceedings, and self-regulatory organization proceedings, as well as certain other proceedings related to suspension or revocation of a professional attainment, designation, or license. Pamela Stamper-Brandt has no required disclosures under this item.

### **Item 4 Other Business Activities**

Pamela Stamper-Brandt is not involved in any outside business activities.

### **Item 5 Additional Compensation**

Pamela Stamper-Brandt does not receive any additional compensation beyond that received as an Investment Advisor Representative of Sustainable Advisors Alliance, LLC.

### **Item 6 Supervision**

As the CCO of Sustainable Advisors Alliance, LLC, Julie Lynn Skye supervises the advisory activities of our firm. Julie Lynn Skye can be reached at (918) 408-7981.