

## ERIC DAHM PART 2B ITEM 1 - COVER PAGE ADV PART 2 B BROCHURE

This supplemental information is about the Managing Member & CCO of Range Financial Group, LLC (“Range Financial Group”). Additional information about Range Financial Group is also available at the SEC’s website [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

7307 SW BEVELAND ST, #110 TIGARD, OREGON 97223

ERIC@RANGEFINANCIALGROUP.COM

(503) 482-4400

CRD # 5748102

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### ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Eric R. Dahm

eric@rangefinancialgroup.com

Year Born: 1976

Educational Background:

Bachelor’s, Business – Oregon State University (2000)

Business Background:

11/2017 – Present: *Managing Member & CCO*, Range Financial Group, LLC

01/2009 – 11/2017: Investment Advisor Representative, Human Investing

03/2008 – 01/2009: *Mortgage Loan Officer*, Valley Bank

11/2007 – 01/2009: *Mortgage Loan Officer*, Bank of America

11/2005 – 11/2007: *Mortgage Loan Officer*, Valley Bank

Professional Qualifications:

Series 65, Uniform Investment Adviser Law Examination (2010)

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### ITEM 3 - DISCIPLINARY INFORMATION

Eric R. Dahm has no legal or disciplinary events that are material to you or a prospective client’s evaluation of this advisory business.

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### ITEM 4 – OTHER BUSINESS ACTIVITIES

The principal business of Eric R. Dahm is that of an investment advisor representative. Eric R. Dahm is also an insurance agent. Employees who are insurance agents may be paid for these services. In cases where we receive payment, there may be a conflict of interest. At all times, you are free to choose outside agents to avoid the possibility of there being a conflict of interest.

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### ITEM 5 - ADDITIONAL COMPENSATION

Other than work with Range Financial Group and any disclosures made in Items 2 and 4 above, Eric R. Dahm receives no additional compensation related to outside business activities.

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**ITEM 6 - SUPERVISION**

Eric R. Dahm is the sole managing member of Range Financial Group and is the supervising authority. Eric R. Dahm remains aware of and keeps us in compliance with the current rules and regulations put forth by each ruling regulatory authority where we conduct our business. Range Financial Group maintains a written compliance manual that is reviewed with employees when they are hired as well as annually. Range Financial Group has established internal policies for the guidance of its trading personnel. Transactions, which vary from the guidelines, are subject to periodic supervisory review. These guidelines are reviewed yearly and periodically adjusted.

Eric R. Dahm is located at 7307 SW Beveland St, #110 Tigard, Oregon 97223 and can be reached by calling (503) 482-4400.

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**ITEM 7 - REQUIREMENTS FOR STATE-REGISTERED ADVISERS**

Other than any disclosures made in Item 3 above, Eric R. Dahm has not been found liable in any additional material arbitration or liable in a civil, self-regulatory organization, or administrative proceeding involving an investment or an investment-related business or activity; fraud, false statement(s), or omissions; theft, embezzlement, or other wrongful taking of property; bribery, forgery, counterfeiting, or extortion; or dishonest, unfair, or unethical practices. Eric R. Dahm has never been the subject of a bankruptcy petition.

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## ROBERT TODD FANKHAUSER PART 2B ITEM 1 - COVER PAGE ADV PART 2 B BROCHURE

This supplemental information is about Robert Todd Fankhauser, Director and Member of Range Financial Group, LLC (“Range Financial Group”). Additional information about Range Financial Group is also available at the SEC’s website [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

7307 SW BEVELAND ST, #110 TIGARD, OREGON 97223  
TODD@RANGEFINANCIALGROUP.COM  
(503) 482-4400  
CRD # 6716172

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### ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Robert Todd Fankhauser  
todd@rangefinancialgroup.com  
Year Born: 1981

#### Educational Background:

Bachelor’s, Business – Pacific Lutheran University (2004)  
Certificate, Accounting – University of Washington (2006)

#### Business Background:

11/2017 – Present: *Director & Member*, Range Financial Group, LLC  
08/20016 – 10/2017: *Investment Advisor Representative*, Human Investing  
10/2012– 08/2016: *Manager*, VergePointe LLP  
01/2007 – 09/2012: *Associate*, Moss Adams LLP

#### Professional Designations:

Certified Financial Planner (CFP®)  
Certified Public Accountant (CPA®)

#### Explanations of Designations:

*CFP®: (Certified Financial Planner)*

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

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

#### *CPA®: (Certified Public Accountant)*

CPAs are licensed and regulated by their state boards of accountancy. While state laws and regulations vary, the education, experience and testing requirements for licensure as a CPA generally include minimum college education (typically 150 credit hours with at least a baccalaureate degree and a concentration in accounting), minimum experience levels (most states require at least one year of experience providing services that involve the use of accounting, attest, compilation, management advisory, financial advisory, tax or consulting skills, all of which must be achieved under the supervision of or verification by a CPA), and successful passage of the Uniform CPA Examination.

In order to maintain a CPA license, states generally require the completion of 40 hours of continuing professional education (CPE) each year (or 80 hours over a two year period or 120 hours over a three year period). Additionally, all American Institute of Certified Public Accountants (AICPA) members are required to follow a rigorous Code of Professional Conduct which requires that they act with integrity, objectivity, due care, competence, fully disclose any conflicts of interest (and obtain client consent if a conflict exists), maintain client confidentiality, disclose to the client any commission or referral fees, and serve the public interest when providing financial services. The vast majority of state boards of accountancy have adopted the AICPA’s Code of Professional Conduct within their state accountancy laws or have created their own.

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### **ITEM 3 - DISCIPLINARY INFORMATION**

Robert Todd Fankhauser has no legal or disciplinary events that are material to you or a prospective client’s evaluation of this advisory business.

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### **ITEM 4 – OTHER BUSINESS ACTIVITIES**

The principal business of Robert Todd Fankhauser is that of an investment advisor representative. Robert Todd Fankhauser is also a CPA. Employees who are CPAs may be paid for these services and in those cases where we receive payment, there may be a conflict of interest. At all times, you are free to choose outside CPAs to avoid the possibility of there being a conflict of interest.

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### **ITEM 5 - ADDITIONAL COMPENSATION**

Other than work with Range Financial Group and any disclosures made in Items 2 and 4 above, Robert Todd Fankhauser receives no additional compensation related to outside business activities.

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**ITEM 6 - SUPERVISION**

Robert Todd Fankhauser is not a supervising authority at Range Financial Group but does work closely with the supervising member of the firm. The supervising member is Eric Dahm; who remains aware of and keeps us in compliance with the current rules and regulations put forth by each ruling regulatory authority where we conduct our business. Range Financial Group has established internal policies for the guidance of its trading personnel. Transactions, which vary from the guidelines, are subject to periodic supervisory review. These guidelines are reviewed yearly and periodically adjusted.

Eric R. Dahm is located at 7307 SW Beveland St, #110 Tigard, Oregon 97223 and can be reached by calling (503) 482-4400.

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**ITEM 7 - REQUIREMENTS FOR STATE-REGISTERED ADVISERS**

Other than any disclosures made in Item 3 above, Eric R. Dahm has not been found liable in any additional material arbitration or liable in a civil, self-regulatory organization, or administrative proceeding involving an investment or an investment-related business or activity; fraud, false statement(s), or omissions; theft, embezzlement, or other wrongful taking of property; bribery, forgery, counterfeiting, or extortion; or dishonest, unfair, or unethical practices. Eric R. Dahm has never been the subject of a bankruptcy petition.