

SEC Form ADV Part 2B Brochure Supplements

Joshua B. Bentz

Katelyn Q. Bombardiere

Kyle W. Dodson

Nathan W. Eix

Conor C. Feldmann

Benjamyn Jordan Patrick

Melina T. Young

COMMAS

April 11, 2024

These brochure supplements provide information about supervised persons listed above that supplement the Commas (or "Firm") brochure. You should have received a copy of that brochure.

Explanations of the minimum qualifications required for professional designations held by supervised persons at Commas are provided at the end of each brochure supplement. The explanations are provided to assist you in understanding the value of each designation.

Please contact James Hadaway, Chief Compliance Officer, at 513-792-6648 or Compliance@truepointwealth.com if you did not receive Commas' brochure or if you have any questions about the contents of this supplement.

Commas
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Cincinnati, OH 45202
(P) 513-301-2871
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Joshua B. Bentz (b. 1990), CFP®

Educational Background:

B.S. in Financial Planning & Counseling, Purdue University, 2014
B.S. in Psychology, Purdue University, 2014

Business Experience:

March 2023 – Present:
Investment Advisor Representative, Commas
April 2016 – February 2023:
Investment Advisor Representative, WealthPoint Advisors

Explanation of Professional Designations:

Certified Financial Planner (CFP)

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”). To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements: 1) complete an advanced college-level course of study addressing financial planning subject areas and attain a Bachelor’s Degree from a regionally accredited United States college or university; 2) pass the CFP® Certification Examination; 3) have at least three years of full-time financial planning-related experience; and 4) agree to be bound by CFP Board’s Standards of Professional Conduct, outlining the ethical and practice standards for CFP® professionals. Individuals must complete 30 hours of continuing education every two years, including two hours on the Code of Ethics, to maintain competence and keep up with developments in the field. Individuals must also renew an agreement to be bound by the Standard of Professional Conduct.

Disciplinary Information: None.

Other Business Activities: None.

Additional Compensation: None.

Supervision:

As Chief Executive Officer & Shareholder, Steve Condon is primarily responsible for supervision of our employees’ advisory activities and advice provided to our clients. James Hadaway is the firm’s Chief Compliance Officer. We have written policies and procedures, which include the use of investment policy statements signed by both the client and the advisor, restrictions on employee personal trading and prohibitions against trading based on material non-public information. Steve and James regularly monitor these and other elements of the firm’s policies and procedures to assure compliance. For additional information, you may contact Truepoint at 513-792-6648.

Katelyn Q. Bombardiere (b. 1995), CFP®

Educational Background:

B.S. in Business Administration, University of Colorado Boulder, 2017

Business Experience:

April 2021 - Present:

Financial Advisor, Commas

July 2020 – March 2021:

Associate Financial Advisor, Kooman & Associates

August 2018 – July 2020:

Associate Wealth Advisor, Mariner Wealth Advisors

October 2017 – July 2018:

Client Service Associate, Lenox Wealth Management

May 2017 – October 2017:

Financial Analyst Intern, River Cities Capital Funds

July 2016 – May 2017:

Bartender & Server, The Kitchen Next Door

Explanation of Professional Designations:

Certified Financial Planner (CFP)

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Disciplinary Information: None.

Other Business Activities: None.

Additional Compensation: None.

Supervision:

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Kyle W. Dodson (b. 1996), CFP®

Educational Background:

B.S. in Finance, Miami University, 2020

Business Experience:

August 2023 – Present:

Financial Advisor, Commas

Wealth Advisor, Truepoint Wealth Counsel

April 2021 – August 2023:

Financial Planning Associate, Truepoint Wealth Counsel

May 2020 – April 2021:

Financial Advisor, Valeo Financial Advisors

Explanation of Professional Designations:

Certified Financial Planner (CFP®)

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Disciplinary Information: None.

Other Business Activities: None.

Additional Compensation: None.

Supervision:

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Brochure Supplement (Part 2B of Form ADV)

Nathan W. Eix (b. 1995), CFP®

Educational Background:

B.S. in Finance, Ball State University, 2018

Business Experience:

January 2024 – Present:

Financial Advisor, Commas

October 2019 – November 2023:

Support Advisor, WealthPoint Advisors, LLC

June 2018 – September 2019:

Associate Brokerage Service Rep, Charles Schwab & Co, Inc.

Explanation of Professional Designations:

Certified Financial Planner (CFP)

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Disciplinary Information: None.

Other Business Activities: None.

Additional Compensation: None.

Supervision:

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Conor Feldmann (b. 1992), CFA

Educational Background:

B.S. in Business Administration, University of Dayton, 2015

Business Experience:

December 2016 – Present:

Portfolio Manager, Truepoint Wealth Counsel

November 2015 - November 2016:

Senior Analyst, Cardinal Health

June 2015 - November 2015:

Accountant, Cardinal Health

Explanation of Professional Designations:

Chartered Financial Analyst (CFA)

The Chartered Financial Analyst 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 holders of the CFA charter 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.

Disciplinary Information: None.

Other Business Activities:

Board of Directors and Finance Committee, St. Joseph Home

Additional Compensation: None.

Supervision:

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Benjamyn Jordan Patrick (b. 1990), CFP®

Educational Background:

B.S. in Business Administration, Georgetown College, 2012
M.B.A in Finance, Xavier University, 2014

Business Experience:

December 2020 – Present:
Financial Advisor, Commas
August 2023 – Present:
Wealth Advisor, Truepoint Wealth Counsel
March 2017 – November 2020:
Financial Planning Associate, Truepoint, Inc.
June 2014 – February 2017:
Registered Rep, Ameriprise Financial Services, Inc.

Explanation of Professional Designations:

Certified Financial Planner (CFP)

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Other Business Activities: None.

Additional Compensation: None.

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Melina T. Young (b. 1995), CFP®

Educational Background:

B.S. in Business Administration, University of the Incarnate Word, 2018

Business Experience:

March 2024 – Present:

Financial Advisor, Commas

January 2019 – March 2024:

Associate Wealth Advisor, Total Wealth Planning, LLC.

Explanation of Professional Designations:

Certified Financial Planner (CFP)

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Other Business Activities: None.

Additional Compensation: None.

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