

# SEC Form ADV Part 2B Brochure Supplements

Joshua B. Bentz

Katelyn Q. Bombardiere

Nathan W. Eix

Conor C. Feldmann

Gwendelyn S. Keihl

Benjamyn Jordan Patrick

Melina T. Young

COMMAS

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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](mailto:Compliance@truepointwealth.com) if you did not receive Commas’ brochure or if you have any questions about the contents of this supplement.

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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:  
Senior Financial Advisor and Shareholder, Commas  
April 2016 – February 2023:  
Lead Advisor, 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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## 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:

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Disciplinary Information: None.

Other Business Activities: None.

Additional Compensation: None.

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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.

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## Gwendelyn S. Keihl (b. 1994), CFP®

### Educational Background:

B.B.A in Marketing, University of Cincinnati, 2017

### Business Experience:

July 2024 – Present:

Financial Advisor, Commas

June 2020 – July 2024:

Investment Advisor Representative, Johnson Investment Counsel, Inc.

July 2015 – June 2020:

Portfolio Manager Assistant, Johnson Investment Counsel, Inc.

### Explanation of Professional Designations:

#### Certified Financial Planner (CFP)

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Disciplinary Information: None.

Other Business Activities: None.

Additional Compensation: None.

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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:

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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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