



Brent L. Walker
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This Brochure Supplement provides information about Brent Walker, Independent Investment Advisor Representative, which supplements the Valmark Advisers, Inc. (“Valmark”) Form ADV Part 2A Brochure. Please inform Brent Walker at the contact information listed above if you did not receive Valmark’s Form ADV Part 2A Brochure or if you have any questions about the contents of this supplement. Additional information about Valmark and Brent Walker is available on the SEC’s website at www.adviserinfo.sec.gov and FINRA’s website at www.finra.org/brokercheck.

Educational Background and Business Experience

Brent L. Walker

Date of Birth: 02/05/1979

Education:

- Bachelor’s of Business Administration in Banking and Finance and Managerial Finance: The University of Mississippi (2002)

Examinations and Professional Designations

- AIF® – Accredited Investment Fiduciary®
The AIF® designation is offered and recognized by the Center for Fiduciary Studies. To earn the AIF®, candidates must a) complete a web-based educational program or a capstone program, and b) pass a final certification exam. Those who obtain the AIF® must complete 6 hours of continuing education annually.
- FINRA Series 7 License - General Securities Representative
- FINRA Series 63 License - Uniform Securities Agent State Law Exam
- FINRA Series 65 License - Investment Advisors Law Exam

Business Experience: Partner– Rivertree Financial Planning – 2015

- Registered Representative- ValMark Securities, Inc. October 18, 2021 to present
- Investment Advisor Representative- Valmark Advisers, Inc. October 18, 2021 to present
- Account Executive- Glynn Griffing and Associates - July 2008 - February 2015

Disciplinary Information

Registered Investment Advisers are required to disclose material facts regarding any investment related legal or disciplinary events, including issues involving criminal or civil actions, findings resulting from administrative proceeding before the SEC, a self-regulatory body or any other federal or state regulatory authority that would be material to your evaluation of each supervised person providing investment advice.

Brent Walker has no disciplinary record that would impact a client’s evaluation of the practice.

Other Business Activities

Brent Walker is a Registered Representative of Valmark Securities, Inc., a broker dealer under common ownership and management of Valmark Advisers, Inc.

Brent Walker is also an insurance agent affiliated with Executive Insurance Agency, Inc., an agency under common ownership and management of Valmark Advisers, Inc.

Brent Walker is President of Cornerstone Financial Services, LLC, a financial services corporation not affiliated with Valmark Advisers, Inc.

Additional Compensation

As a Registered Representative of an affiliated broker dealer, Valmark Securities, Inc., Brent Walker is eligible to receive normal commissions associated with securities sales.

Brent Walker is also eligible to receive insurance commissions surrounding the sales of insurance products sold through the affiliated insurance agency, Executive Insurance Agency, Inc.

Brent Walker may receive compensation from Cornerstone Financial Services, LLC. Cornerstone Financial Services, LLC is a shareholder in Rivertree Financial Planning, LLC.

Supervision

Brent Walker is an independent investment advisor representative. However, before accepting and implementing investment strategies recommended, supervisory principals at the Valmark home office review and approve of the investment strategies. Accounts are reviewed periodically, usually at least annually by the independent advisor. The home office compliance team also periodically reviews accounts and strategies. These initial and ongoing reviews are under the direction of OSJ Principal Zach Hurst who may be reached at 330-576-1234 to discuss questions or concerns in connection with the internal compliance program.