



Brady W. Gray  
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This Brochure Supplement provides information about Brady Gray, Independent Investment Advisor Representative, which supplements the Valmark Advisers, Inc. ("Valmark") Form ADV Part 2A Brochure. Please inform Brady Gray 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 Brady Gray is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) and FINRA's website at [www.finra.org/brokercheck](http://www.finra.org/brokercheck).

### **Educational Background and Business Experience**

Brady W. Gray

Date of Birth: 3/3/2001

#### **Education:**

- Master of Business Administration (MBA): Mississippi State University
- Bachelor of Business Administration in Finance: Mississippi State University

#### **Examinations and Professional Designations:**

- FINRA Series 7 License - General Securities Representative
- FINRA Series 66 License - Uniform Combined State Law Exam
- Insurance License – Life, Accident, and Health

#### **Business Experience:**

- Financial Advisor – Rivertree Financial Planning January 2, 2025, to present
- Registered Representative – Valmark Securities, Inc. January 2, 2025, to present
- Investment Advisor Representative – Valmark Advisers, Inc. January 2, 2025, to present
- Advisor Assistant – Rivertree Financial Planning June 10, 2024, to January 1, 2025

### **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.

Brady Gray has no disciplinary record that would impact a client's evaluation of the practice.

### Other Business Activities

Brady Gray is a Registered Representative of Valmark Securities, Inc., a broker-dealer under common ownership and management of Valmark Advisers, Inc.

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

### Additional Compensation

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

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

### Supervision

Brady Gray 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.