
PART 2B OF FORM ADV: BROCHURE SUPPLEMENT

Name of Supervised Person:

KEVIN D. BURRIS

February 17, 2020

Item 1 – Cover Page

Spectrum Management Group, LLC.
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THIS BROCHURE SUPPLEMENT PROVIDES INFORMATION ABOUT KEVIN D. BURRIS THAT SUPPLEMENTS THE SPECTRUM MANAGEMENT GROUP, LLC. BROCHURE. YOU SHOULD HAVE RECEIVED A COPY OF THAT BROCHURE. PLEASE CONTACT US AT (317) 663-5600 IF YOU DID NOT RECEIVE A COPY OF THE SPECTRUM MANAGEMENT GROUP, LLC. BROCHURE OR IF YOU HAVE ANY QUESTIONS ABOUT THE CONTENTS OF THIS BROCHURE SUPPLEMENT.

ADDITIONAL INFORMATION ABOUT KEVIN D. BURRIS IS AVAILABLE ON THE SEC'S WEBSITE AT www.adviserinfo.sec.gov.

Item 2 – Educational Background and Business Experience

Kevin D. Burris was born in 1959. Mr. Burris currently holds the position of Financial Planner at Spectrum Management Group, LLC. (“SMG”). Mr. Burris was registered as an Associated Person of SMG in September of 2019. Mr. Burris graduated from Indiana University in 1981 with a Bachelor of Arts in Telecommunications. Mr. Burris also obtained him MBA in Finance and Marketing from Indiana University in 1986.

Mr. Burris is currently a CFP Candidate. A CFP Candidate has passed the rigorous examination but has not yet completed the required 6,000 hours of professional experience related to the financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements. The Certified Financial Planner™, CFP® are professional certification marks granted in the United States by the 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. 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; Candidates must pass an exam, are bound by a Code of Ethics and are required to complete thirty hours of continuing education every two years.

Prior to joining SMG, Mr. Burris worked for H&R Block as an Office Manager from October, 2018 until August, 2019. Mr. Burris served as a Relationship Manager with Precedent Asset Management, LLC from October, 2017 to October, 2018. Prior to this Mr. Burris worked with Canterbury Investment Management, LLC where he served as the Director, Private Client Group form March, 2016 through October, 2017. Finally, Mr. Burris was a salesperson for AstraZeneca from April, 2014 through October, 2017.

Item 3 – Disciplinary Information

Mr. Burris has no legal or disciplinary events to report that would be material to a client’s or prospective client’s evaluation of SMG’s advisory business or the integrity of its management.

Item 4 – Other Business Activities

Mr. Burris is not actively engaged in any investment-related or non-investment-related business or occupation other than her position with SMG, as disclosed in Item 2 above. Mr. Burris is not registered, and does not have an application pending to register, as a broker-dealer, registered representative of a broker-dealer, futures commission merchant, commodity pool operator, commodity trading advisor, or an associated person

of a futures commission merchant, commodity pool operator, or commodity trading advisor.

Item 5 – Additional Compensation

No third party which is not a client of SMG provides any economic benefit to Mr. Burris for providing advisory services.

Item 6 – Supervision

Mr. Burris is supervised by Leslie D. Thompson, the Managing Principal and Chief Compliance Officer of SMG. Ms. Thompson may be contacted at (317) 663-5600. Mr. Burris is required to adhere to SMG's written supervisory policies and procedures, Code of Ethics, and investment advisory agreement with each client. Additionally, SMG monitors the advice and advisory services Mr. Burris provides to clients by performing ongoing and periodic reviews of account opening documentation, transactions in client accounts, and correspondence that Mr. Burris sends and receives from clients, as in accordance with SMG's written supervisory policies and procedures. SMG also monitors Mr. Burris's advice in an effort to ensure that investments are suitable for her individual clients and consistent with their individual needs, goals, objectives, and risk tolerance, as well as any restrictions requested by SMG's clients.

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