

Aidan Baron

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This Brochure Supplement provides information about Aidan Baron, Independent Investment Advisor Representative, which supplements the Valmark Advisers, Inc. ("Valmark") Form ADV Part 2A Brochure. Please inform Aidan Baron 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 Aidan Baron 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

Aidan Baron

Date of Birth: 06/21/2002

Education:

- Christopher Newport University- B.S. in Finance
- Christopher Newport University- Masters in Financial Analysis

Examinations and Professional Designations:

- Series 7 - General Securities Representative
- Series 66 - Uniform Combined State Law Exam
- ChFC - Chartered Financial Consultant®

The ChFC® designation is issued by the American College. To earn the professional designation, candidates must complete six core courses and two elective courses and successfully pass a proctored final exam for each course. Candidates must also have at least 3 years of full-time business experience within the 5 years preceding being awarded the designation. Every 2 years, 30 hours of continuing education credits are required.

Business Experience: [Title – Company – Date]

- Financial Advisor – W3 Financial Group – July 2024 to Present
- Investment Advisor Representative – Valmark Advisers, Inc. -March 2024 to Present
- Registered Representative- ValMark Securities, Inc. July 2024 to present

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.

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

Other Business Activities

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

Aidan Baron 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., Aidan Baron is eligible to receive normal commissions associated with securities sales.

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

Supervision

Aidan Baron 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 Sam Galloway who may be reached at 330-576-1234 to discuss questions or concerns in connection with the internal compliance program.