

James D. Yurman



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This Brochure Supplement provides information about James D. Yurman, Independent Investment Advisor Representative, which supplements the Valmark Advisers, Inc. (“Valmark”) Form ADV Part 2A Brochure. Please inform James D. Yurman 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 James D. Yurman 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

James D. Yurman

Date of Birth: 6/27/1934

Education:

- Incomplete College

Examination and Professional Designations:

- Series 6 – Investment Company Products/Variable Contracts Limited Representative
- Series 63 – Uniform Securities Agent State Law Exam

Business Experience: [Title – Company – Date]

- 04/1962 – Present James D. Yurman & Associates, Inc. – Agent
- 10/1997 – Present ValMark Securities, Inc. – Registered Representative
- 06/2008 – Present ValMark Advisers, Inc. – Investment Adviser Representative
- 06/2008 – 04/2018 Concord Advisors – Advisor
- 04/2018 – Present Grand River Capital, LLC - Advisor

CFP® – CERTIFIED FINANCIAL PLANNER™

The CFP® designation is offered and recognized by the Certified Financial Planning Board of Standards, Inc. Candidates must have a bachelor’s degree (or higher) from an accredited college or university and at least 3 years of full-time personal financial planning experience. Certificants must complete a CFP®-board registered program or hold one of the following designations; CPA, ChFC®, CLU®, CFA®, Ph.D. in business or economics, Doctor of Business Administration, or an Attorney’s License. Certificants must also successfully pass a 2-day comprehensive examination and complete 30 hours of continuing education credits every 2 years.

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.

James D. Yurman has no disciplinary record that would impact a client's evaluation of the practice.

Other Business Activities

James D. Yurman is a Registered Representative of Valmark Securities, Inc., a broker dealer under common ownership and management of Valmark Advisers, Inc.

James D. Yurman 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., James D. Yurman is eligible to receive normal commissions associated with securities sales.

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

Supervision

James D. Yurman 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 Chris Finefrock who may be reached at 330-576-1234 to discuss questions or concerns in connection with the internal compliance program.

