



Klaas Financial Asset Advisors, LLC

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## Form ADV Part 2B – Brochure Supplement *for*

**Joshua E. Stirling, CFA®**

Personal CRD Number: 6865628

Director of Portfolio Management

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March 1, 2023

### Item 1. [Cover Page](#)

This Brochure Supplement provides information about Joshua E. Stirling that supplements the Klaas Financial Asset Advisors, LLC Disclosure Brochure and/or Wrap Fee Program Brochure. You should have received a copy of one or both of those brochures. Please contact us at (877) 495-5227 or by email at [info@klaasfinancial.com](mailto:info@klaasfinancial.com) if you did not receive our Disclosure Brochure and/or Wrap Fee Program Brochure, or if you have any questions about the contents of this Brochure Supplement.

Additional information about Josh is available on the SEC's website at [adviserinfo.sec.gov](http://adviserinfo.sec.gov) by conducting an Individual search using his CRD No. 6865628.

## Item 2. Educational Background and Business Experience

Born: 1990

### Educational Background

- Bachelor of Business Administration-Finance (2016) – University of Wisconsin-Milwaukee

### Business Background

- March 2023 - Present **Klaas Financial Asset Advisors, LLC**  
*Director of Portfolio Management*
- March 2022 - February 2023 **Klaas Financial Asset Advisors, LLC**  
*Portfolio Manager*
- January 2018 - March 2022 **Klaas Financial Asset Advisors, LLC**  
*Portfolio Management Specialist*

### Professional Designation

**CFA® - Chartered Financial Analyst®.** The Chartered Financial Analyst® (CFA®) designation is conferred by the CFA Institute. A financial analyst seeking membership to the CFA Institute must: meet eligibility requirements; fully comply with the CFA Code of Ethics and Standards of Professional Conduct; study books, journal articles, and other readings designated by the CFA Institute; successfully pass three examinations, each approximately six hours in length and administered by the CFA Institute. The candidate for the CFA designation must have at least a single current and principal engagement: in financial analysis of securities investment for a bank, investment company, insurance company, or other financial services or investment management firm; as an assistant, associate, or full professor or dean of a college or university, who teaches and/or researches; as an economist involved in financial analysis of securities investment; as a portfolio manager; as a financial analyst of securities investment within a public agency; as a financial analyst of securities investment for a corporate pension, profit sharing, or other retirement fund; or as a manager of financial analysts or portfolio managers involved with securities investment and who, before assumption of management obligations, was a financial analyst or portfolio manager. The CFA is awarded to candidates who have passed the examinations and met the other requirements specified by the CFA Institute.

## Item 3. Disciplinary Information

Josh has no disciplinary information to disclose.

## Item 4. Other Business Activities

In June 2022, Josh was elected to serve a two-year term on the Board of Directors of the CFA® Society Madison. He is a member of the Programming Committee responsible for coordinating relevant speakers and educational industry content for members of the organization. This is a volunteer position; Josh receives no compensation. Therefore, it is not anticipated that this will present a conflict of interest.



### Item 5. Additional Compensation

Other than salary and bonuses from his employment with Klaas Financial Asset Advisors, LLC, Josh does not receive any additional compensation from non-clients for providing advisory services.

### Item 6. Supervision

As Director of Portfolio Management of Klaas Financial Asset Advisors, LLC, Josh works closely with the Supervisors, Craig Jared (C.J.) Klaas and Maleeah L. Wernsing-Cuevas.

C.J.'s contact information is:

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Maleeah's contact information is:

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