

Item 1: Cover Page
Part 2B of Form ADV: Brochure Supplement
February 2023

Marah B. Fineberg-Kuck, CFP®

Fineberg Financial Management LLC
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www.finebergfinancial.com

Firm Contact:
Marah Fineberg-Kuck
Chief Compliance Officer

This brochure supplement provides information about Marah Fineberg-Kuck that supplements our brochure. You should have received a copy of that brochure. Please contact Marah Fineberg-Kuck if you did not receive Fineberg Financial Management LLC's brochure or if you have any questions about the contents of this supplement. Additional information about Marah Fineberg-Kuck is available on the SEC's website at www.adviserinfo.sec.gov by searching CRD #4572003.

Item 2: Educational Background & Business Experience

Marah B. Fineberg-Kuck, CFP®, CRPC®

Year of Birth: 1979

Educational Background:

- 2002: University of California at San Diego; Double Bachelors of Science in Economics and Chinese Studies
- 2005: University of San Diego; International Trade Finance Certificate, International Trade Finance

Business Background:

- 09/2022 – Present Fineberg Financial Management LLC; President, Managing Director, Chief Compliance Officer and CERTIFIED FINANCIAL PLANNER™ Professional
- 09/2022 – Present Private Client Services, LLC; CERTIFIED FINANCIAL PLANNER™ Practitioner, Registered Representative
- 12/2011 – 09/2022 Wells Fargo Clearing Services; Senior Vice President
- 2012-2018 Seal Beach Chamber of Commerce Board of Directors 6 years and four year Chair Governmental Affairs Committee (GAC)
- 2017-2018 Vice President of Seal Beach Chamber of Commerce, CA
- 2012- Present Member, The Financial Planning Association of Orange County (FPAOC).
- 2002- Present Member of Seal Beach CA Chapter of Lions Club International
- 2014 Marah also attended invite only Barron's Women Advisors Summit in Florida
- 03/2005 – 12/2011 Merrill Lynch Wealth Management (Banc of America Investments, Inc.), Vice President Financial Advisor
- 03/2003 – 10/2004 PMB Securities Corp., La Jolla CA , Investment Officer and Financial Advisor (subsidiary of Pacific Mercantile Bank, CA)
- 06/2002 – 3/2003 Tax & Financial Group, Del Mar, CA, Investment & Insurance Consultant, Financial Advisor

Exams, Licenses & Other Professional Designations:

- 2018: Securities Industry Essentials Examination
- 2009: Chartered Retirement Planning Counselor (CRPC®) designation.
- 2004: Series 66
- 2003: Series 7 & 63
- 2002: Series 6

2012 CERTIFIED FINANCIAL PLANNER™

The CFP® certification is obtained by completing an advanced college-level course of study addressing the financial planning subject areas that the CFP® Board's studies have determined as necessary for the competent and professional delivery of financial planning services, a comprehensive certification exam and agreeing to be bound by the CFP® board's *Standard of Professional Conduct*. As a prerequisite, the individual must have a Bachelor's degree from a regionally accredited United States college or university (or foreign university equivalent) and have at least 3 years of full time financial planning experience (or equivalent measured at 2,000 hours per year). This designation requires renewing an agreement to be bound by the *Standards of Professional Conduct*. In addition, CFP® professionals are required to complete 30 hours of continuing education (CE) each reporting period (annually) of which 2 hours must be of CFP Board approved Ethics CE, and 28 hours of CE covering one or more of CFP Board's Principal Topics. The CE requirement is effective immediately upon initial certification.

Item 3: Disciplinary Information

There are no legal or disciplinary events material to the evaluation of Marah Fineberg-Kuck.

Item 4: Other Business Activities

Marah Fineberg-Kuck is a registered representative of Private Client Services, LLC, member FINRA/SIPC. She may offer products and receive normal and customary commissions as a result of these transactions. A conflict of interest may arise as these commissionable securities sales may create an incentive to recommend products based on the compensation earned. To mitigate this potential conflict, Marah Fineberg-Kuck, as a fiduciary, will act in the client's best interest.

Marah Fineberg-Kuck is a licensed insurance agent. She may offer insurance products and receive customary fees as a result of insurance sales. A conflict of interest may arise as these insurance sales may create an incentive to recommend products based on the compensation earned. To mitigate this potential conflict, Marah Fineberg-Kuck, as a fiduciary, will act in the client's best interest.

Marah Fineberg-Kuck is the President, Founder, and Executive Director of Women's Symposium, a non-profit organization dedicated to providing financial literacy.

Marah Fineberg-Kuck is a volunteer at the Financial Planning Association of Orange County, through which she assists individuals with financial planning pro bono.

Item 5: Additional Compensation

Marah Fineberg-Kuck does not receive any other economic benefit for providing advisory services in addition to advisory fees.

Item 6: Supervision

Marah Fineberg-Kuck is the sole owner and Chief Compliance Officer and as such has no internal supervision placed over her. She is, however, bound by our firm's Code of Ethics. If you have any questions about Marah Fineberg-Kuck or the contents of this brochure, please contact us at 562-446-0028.

Item 7: Requirements for State-Registered Advisers

Marah Fineberg-Kuck has not been involved in any arbitration claim alleging damages in excess of \$2,500. Furthermore, she has neither been involved in nor found liable in any civil, self-regulatory organization, or administrative proceeding nor has been the subject of any bankruptcy petitions.