

Dimensional Fund Advisors

DFA is a mutual fund company that has pioneered the implementation of academically based, cost effective investment strategies. AKM Advisory uses DFA mutual funds for a meaningful portion of its clients' assets. For more information about DFA, please see their website at [us.dimensional.com](https://www.usdimensional.com)

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Charles Schwab & Co.

AKM Advisory uses Charles Schwab & Co. as its custodian. Charles Schwab is the leading custodian for registered investment advisors across the country and provides world-class brokerage and custodial services for AKM Advisory clients. For more information about Charles Schwab & Co., please see their [Client Learning Center](#) .

CFA Institute and CFP Board

Both the CFA and CFP® designations require adherence to their own codes of conduct. Please see the CFA Institute's [Codes, Standards, and Guidelines](#) ; and the CFP Board's [Standards of Professional Conduct](#) for additional information.