

1. Brochure Supplement - Part 2B

Mark E. Schutter
Blake-Schutter Wealth Advisors LLC

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Part 2B (“Brochure Supplement”)

This Brochure Supplement provides information about Mark E. Schutter that supplements the Blake-Schutter Wealth Advisors Brochure. You should have received a copy of that Brochure. Please contact Edward J. Blake, Chief Compliance Officer, at 937-956-7870, or at Ed.Blake@blakeschutter.com if you did not receive Blake-Schutter Wealth Advisors’ Brochure or if you have any additional questions about the contents of this supplement.

Additional information about Mark E. Schutter is available on the SEC’s website at www.adviserinfo.sec.gov/.

2. Item 2 – Education Background and Business Experience

Mark E. Schutter- Investment Advisory Representative

Born: 1963

Formal Education after High School:

University of Dayton, B.S.B.A.

University of Cincinnati, MS with concentration in Taxation

Professional Designations Completed:

Certified Public Accountant (CPA)¹

National Association of Securities Dealers (NASD) Series 6

North American Securities Administrators Association (NASAA) Series 1- 65

Recent Business Background:

Managing Member, Blake-Schutter Wealth Advisors, January 2018-Present

President, Culmen Real Estate Services, Inc., January 2018-Present

President & Chief Investment Officer, Miller-Valentine Investments, September 2008- Present

Executive Vice President & President, Dean Financial Services, January 2002- September 2008

¹The Certified Public Accountant (CFP®) designation was first established in 1896 and is the title of qualified accountants globally in the English-speaking world. To become a CPA in the United States, a candidate must sit for and pass the Uniform Certified Public Accountant Examination, which is set by the American Institute of Certified Public Accountants (AICPA) and administered by the National Association of State Boards of Accountancy (NASBA).

There are currently more than 600,000 CPAs. To earn the CPA designation, candidates must: 1) complete 150 college semester hours, which usually requires an additional year of education past a regular four-year college degree, or a master's degree (varies by state); and 2) pass four, four-hour examinations covering the following areas- Audit and Attestation, Business Environments and Concepts, Financial Accounting and Reporting, and Regulation. Although the CPA exam and "150 hour rule" is uniform, licensing and certification requirements are imposed separately by each state's laws and may vary from state-to-state. State requirements vary but involve the following: 1) a minimum amount of qualified professional experience; and 2) a commitment to abide by adherence to the Professional Ethics for CPAs.

High Ethical Standards

Over 40 of the state boards (including Ohio) now require applicants for CPA status to complete a special examination on ethics, which is effectively a fifth exam in terms of requirements to become a CPA. The AICPA, state boards of accountancy, state society of CPAs, state statutes, and other regulatory agencies (such as the NASD, SEC, etc.) set forth ethical rules and regulations for CPAs. The AICPA Code of Professional Conduct established the fundamental principles of professional ethics:

- Responsibilities- cultivate the profession, cooperate with peers in the industry, and maintain public confidence to provide professional services;
- The Public Interest- every action should work toward serving the public interest;
- Integrity- live by the standard "do what is right, do what you think is right, and do not do what you know is wrong";
- Objectivity and Independence- act independently in both fact and appearance when providing professional services;
- Due Care- provide professional services to the best of one's ability through continuing education, seeking consultation when needed, ensuring adequate planning and supervision, and performing annual performance evaluations.

Continuing Profession Education

CPAs are required to take continuing education courses toward continuing professional development (CPE) to renew their license. Requirements vary by state, but the vast majority requires an average of 40 hours of CPE every year with a minimum of 20 hours per calendar year. These requirements can be fulfilled through attending live seminars, webcast seminars, or through self-study format. As part of the CPE requirement,

most states (of which Ohio is one) requires an ethics course ranging from 2-8 hours every three years. To learn more about the CPA designation, visit www.aicpa.org.

3. Item 3—Disciplinary Information

Mr. Schutter has not nor is currently the subject to any criminal, civil, or disciplinary action.

4. Item 4—Other Business Activities

President, Culmen Real Estate Services, Inc., January 2018-Present
President & Chief Investment Officer, Mid-States Partners LLC, September 2008- Present
President & Chief Investment Officer, MV Partners INV LLC, September 2008- Present
President & Chief Investment Officer, MV Partners MGMT LLC, September 2008- Present
President & Chief Investment Officer, Miller-Valentine Partners Ltd., September 2008- Present
President & Chief Investment Officer, MVP LTD Securities LLC, September 2017- Present
Board Member, Goodwill Easter Seals Miami Valley, March 2020-Present
Finance Committee Member, Greene County Community Foundation, January 2010-Present
Treasurer, Centerville Baseball Softball League, January 2005-Present
Board Member, University of Dayton Davis Center for Portfolio Management, 2010-present

5. Item 5—Additional Compensation

Mr. Schutter earns over \$100,000 from his other business activities annually.

6. Item 6—Supervision

Mr. Schutter's activities on behalf of Blake-Schutter Wealth Advisors are monitored by the firm's Chief Compliance Officer. The firm has adopted policies and procedures to oversee, monitor and control the activities of its Supervised Persons. The person responsible for monitoring the advice and activities provided by Mr. Schutter is Edward J. Blake, Chief Compliance Officer. Mr. Blake can be reached at Ed.Blake@blakeschutter.com or by calling (937) 956-7870.

7. Item 7—State Registered Advisers

Mark E. Schutter has not been involved in any of the events listed below.

1. An award or otherwise being found liable in arbitration claim alleging damages in excess of \$2,500, involving any of the following:

- a) an investment or an investment-related business activity;
- b) fraud, false statement(s), or omissions;
- c) theft, embezzlement, or other wrongful taking of property;
- d) bribery, forgery, counterfeiting, or extortion; or
- e) dishonest, unfair, or unethical practices.

2. An award or otherwise being found liable in a civil, self-regulatory organization, or administrative proceeding involving any of the following:

- a) an investment or an investment-related business activity;
- b) fraud, false statement(s), or omissions;
- c) theft, embezzlement, or other wrongful taking of property;
- d) bribery, forgery, counterfeiting, or extortion; or
- e) dishonest, unfair, or unethical practices.

Mr. Schutter has not been the subject of a bankruptcy petition in the past ten years.