



MERCER GLOBAL ADVISORS INC

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Item 1 – Form ADV Part 2B / Brochure Supplement Explanation, a list of your Mercer Global Advisors Team, and the Table of Contents

This brochure provides information about the Mercer Global Advisors Business Team listed below. This information supplements the ADV, Part 2A Company Disclosure Brochure. Please contact your Advisory Team directly if you did not receive the Mercer Global Advisors Inc. Disclosure Brochure (Form ADV, Part 2A) or if you have any questions about the content of this Brochure Supplement. You may also contact the Compliance Department directly at 1 (805) 565-1681 if you did not receive the ADV, Part 2A Company Disclosure Brochure or if you have any questions about the contents of this supplement.

Information on the following individuals is presented in this Brochure Supplement:

D. Linette Dobbins
Jennifer Currin Gutridge

Judith A. McGee
James L. Roundy

Sarah E. Berry
Theresa M. Bedard

Additional information on these individuals is available on the SEC's website at www.adviserinfo.sec.gov.

Mercer Global Advisors Inc. is registered with the Securities and Exchange Commission and delivers all investment-related services. Mercer Advisors Inc. is the parent company of Mercer Global Advisors Inc. and is not involved with investment services.

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Items 2 – 6 Your Mercer Global Advisors Team

Branch name:

Mercer Advisors Portland South, OR Office

Address:

12455 S.W. 68th Avenue

Portland, Oregon

(503) 597-2222

Phone number:

D. Linette Dobbins, CFP®

Year Born 1964

Senior Lead Advisor & Branch Manager

Linette began her career in the financial services industry in 1985 with Piper Jaffrey & Hopwood. Prior to joining Mercer Advisors in 2021, she was the co-founder and President of McGee Wealth Management, Inc., wealth management firm in Portland, OR. She is a CERTIFIED FINANCIAL PLANNER™ professional and a graduate of The College for Financial Planning in Denver, CO. For 25 years, she was the co-branch manager for Raymond James Financial Services, Inc., member FINRA/SIPC, in Portland.

Item 3 - Disclosure and/or Disciplinary Information

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. There is NO applicable information to disclose about D. Linette Dobbins for this item.

Other public information on D. Linette Dobbins is available on the SEC's website at www.adviserinfo.sec.gov.

Item 4 – Other Outside Business Activities

D. Linette Dobbins does engage in other outside business activities.

- a. Linette is part owner of The Hive Catering Co in Oregon City, OR. She spends less than 1 hour per month on this activity. This activity is not investment related. See compensation information in Item 5.
- b. Linette is a Managing Member of Elk Meadow, LLC a family real estate investment company in Portland, OR. She spends less than 1 hour per month on this activity. This activity is not investment related. See compensation information in Item 5.
- c. Linette is a Manager of Lake City Holdings, LLC a family real estate investment company in Portland, OR. She spends less than 1 hour per month on this activity. This activity is not investment related. See compensation information in Item 5.
- d. Linette is a Manager of McGee Defoe Commercial, LLC a family real estate investment company in Portland, OR. She spends less than 1 hour per month on this activity. This activity is not investment related. See compensation information in Item 5.
- e. Linette is a Manager of McGee Defoe Residential, LLC a family real estate investment company in Portland, OR. She spends less than 1 hour per month on this activity. This activity is not investment related. See compensation information in Item 5.
- f. Linette is a Board Member for OHSU Woman's Circle of Giving in Portland, OR. She spends about 5 hours per year on this activity. This activity is not investment related. See compensation information in Item 5.

Item 5 – Additional Compensation

- a. Linette does not receive compensation as part owner of The Hive Catering Co.
- b. Linette does not receive compensation as a Managing Member of Elk Meadow, LLC.
- c. Linette does not receive compensation as a Manager of Lake City Holdings, LLC.
- d. Linette does not receive compensation as a Manager of McGee Defoe Commercial, LLC.
- e. Linette does not receive compensation as a Manager of McGee Defoe Residential, LLC.
- f. Linette does not receive compensation as a Board Member for OHSU Woman's Circle of Giving.

Item 6 – Supervision

Mr. Josh DeForest, Head of Client Services for Mercer Global Advisors Inc., has supervisory responsibilities for D. Linette Dobbins. Mr. DeForest can be reached at (425) 278-0131.

Designation Minimum Qualifications

D. Linette Dobbins holds the following licenses and/or credentials: Series 65 license, CFP®
Please see designation and/or credentialing descriptions starting on page 7.

Judith A. McGee, CFP®, ChFC®

Year Born 1942

Executive Vice President & Senior Lead Advisor

Judith joined Mercer Advisors in 2021 as Executive Vice President and Senior Lead Advisor in the Portland, OR South office. She was the co-founder of McGee Wealth Management, Inc. in 2000. She is a CERTIFIED FINANCIAL PLANNER™ professional and earned a Chartered Financial Consultant designation in 2015 from the American College of Financial Services.

Item 3 - Disclosure and/or Disciplinary Information

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. There is NO applicable information to disclose about Judith A. McGee for this item.

Other public information on Judith A. McGee is available on the SEC's website at www.adviserinfo.sec.gov.

Item 4 – Other Outside Business Activities

Judith A. McGee does engage in other outside business activities.

- a. Judith is Co-Owner of Defoe Companies, Inc. a family real estate investment company in Portland, OR. She spends less than 1 hour per month on this activity. This activity is not investment related. See compensation information in Item 5.
- b. Judith is a Managing Member of Elk Meadow, LLC a family real estate investment company in Portland, OR. She spends less than 1 hour per month on this activity. This activity is not investment related. See compensation information in Item 5.
- c. Judith is a Managing Member of McGee Defoe Commercial, LLC a family real estate investment company in Portland, OR. She spends less than 1 hour per month on this activity. This activity is not investment related. See compensation information in Item 5.
- d. Judith is a Manager of McGee Defoe Residential, LLC a family real estate investment company in Portland, OR. She spends less than 1 hour per month on this activity. This activity is not investment related. See compensation information in Item 5.
- e. Judith is a Managing Member of Lake City Holdings, LLC a family real estate investment company in Post Falls, ID. She spends less than 1 hour per month on this activity. This activity is not investment related. See compensation information in Item 5.
- f. Judith is the Board Secretary of Women's Leadership Alliance in Jacksonville, FL. She spends about 5 hours per month on this activity. This activity is not investment related.
- g. Judith is a Committee Member of the Oregon Business Council in Portland, OR. She spends less than 1 hour per month on this activity. This activity is not investment related. See compensation information in Item 5.
- h. Judith is the Treasurer of the Board of the Rice Museum of Rock and Minerals in Hillsboro, OR. She spends about 1 hour per week on this activity. This activity is not investment related. See compensation information in Item 5.

Item 5 – Additional Compensation

- a. Judith does not receive compensation as Co-Owner of Defoe Companies, Inc.
- b. Judith does not receive compensation as a Managing Member of Elk Meadow, LLC.
- c. Judith does not receive compensation as a Managing Member of McGee Defoe Commercial, LLC.
- d. Judith does not receive compensation as a Managing Member of McGee Defoe Residential, LLC.
- e. Judith does not receive compensation as a Managing Member of Lake City Holdings, LLC.
- f. Judith does not receive compensation as Board Secretary of Women's Leadership Alliance.

- g. Judith does not receive compensation as Committee Member of the Oregon Business Council.
- h. Judith does not receive compensation as Treasurer of the Board of the Rice Museum of Rock and Minerals.

Item 6 – Supervision

Mrs. D. Linette Dobbins, Senior Lead Advisor & Branch Manager for Mercer Global Advisors Inc., has supervisory responsibilities for Judith A. McGee. Mrs. Dobbins can be reached at (503) 597-2222.

Designation Minimum Qualifications

Judith A. McGee holds the following licenses and/or credentials: Series 65, CFP®, ChFC®
Please see designation and/or credentialing descriptions starting on page 7.

Jennifer Currin Gutridge, CFP®

Year Born 1972

Senior Wealth Advisor

Prior to joining Mercer Advisors in 2021, Jennifer was Senior Vice President of McGee Wealth Management, Inc., an SEC independent registered investment advisor in Portland, Oregon and a registered representative for Raymond James Financial Services, Inc., member FINRA/SIPC. She began her career in the financial services industry over 29 years ago while still attending college at Portland State University.

Item 3 - Disclosure and/or Disciplinary Information

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. There is NO applicable information to disclose about Jennifer Currin Gutridge for this item.

Other public information on Jennifer Currin Gutridge is available on the SEC's website at www.adviserinfo.sec.gov.

Item 4 – Other Outside Business Activities

Jennifer Currin Gutridge does not engage in other outside business activities.

Item 5 – Additional Compensation

Jennifer Currin Gutridge does not engage in other activities that render additional compensation.

Item 6 – Supervision

Mrs. D. Linette Dobbins, Senior Lead Advisor & Branch Manager for Mercer Global Advisors Inc., has supervisory responsibilities for Jennifer Currin Gutridge. Mrs. Dobbins can be reached at (503) 597-2222.

Designation Minimum Qualifications

Jennifer Currin Gutridge holds the following licenses and/or credentials: Series 66 license, CFP®
Please see designation and/or credentialing descriptions starting on page 7.

Sarah E. Berry

Year Born 1981

Senior Wealth Advisor

Prior to joining Mercer Advisors in 2021, Sarah had over twenty years of experience in the financial services industry. She graduated from the University of Oregon with a Bachelor of Science degree in Sociology and Business in 2004. In 2007, she joined Raymond James Financial Services, Inc. (RJFS) member FINRA/SIPC becoming a registered principal. She was responsible for advising clients, operations and branch manager duties. In August 2013, Sarah accepted a role with Waddell & Reed as the Market Director for the State of Oregon and SW Washington. Her position included training, coaching and supervision. In April 2019 Sarah joined the advisory team at McGee Wealth Management, Inc., a Registered Investment Advisor and branch of RJFS.

Item 3 - Disclosure and/or Disciplinary Information

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. There is NO applicable information to disclose about Sarah E. Berry for this item.

Other public information on Sarah E. Berry is available on the SEC's website at www.adviserinfo.sec.gov.

Item 4 – Other Outside Business Activities

Sarah E. Berry does engage in other outside business activities.

Sarah is Owner of a rental property in Portland OR. She spends about 1 hour per month on this activity. This activity is not investment related. See compensation information in Item 5.

Item 5 – Additional Compensation

Sarah receives compensation as owner of the rental property.

Item 6 – Supervision

Mrs. D. Linette Dobbins, Senior Lead Advisor & Branch Manager for Mercer Global Advisors Inc., has supervisory responsibilities for Sarah E. Berry. Mrs. Dobbins can be reached at (503) 597-2222.

Designation Minimum Qualifications

Sarah E. Berry holds the following licenses and/or credentials: Series 65 license

Please see designation and/or credentialing descriptions starting on page 7.

James A. Roundy, CFP®

Year Born 1986

Financial Planner

James began his career in the financial industry in 2018. Prior to joining Mercer Advisors, he worked as a financial planning associate while earning his CERTIFIED FINANCIAL PLANNER™ professional designation in October 2020. James earned his B.A. in Economics in 2010 from the University of Idaho.

Item 3 - Disclosure and/or Disciplinary Information

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. There is NO applicable information to disclose about James A. Roundy for this item.

Other public information on James A. Roundy is available on the SEC's website at www.adviserinfo.sec.gov.

Item 4 – Other Outside Business Activities

James A. Roundy does not engage in other outside business activities.

Item 5 – Additional Compensation

James A. Roundy does not engage in other activities that render additional compensation.

Item 6 – Supervision

Mrs. D. Linette Dobbins, Senior Lead Advisor & Branch Manager for Mercer Global Advisors Inc., has supervisory responsibilities for James A. Roundy. Mrs. Dobbins can be reached at (503) 597-2222.

Designation Minimum Qualifications

James A. Roundy holds the following licenses and/or credentials: CFP®

Please see designation and/or credentialing descriptions starting on page 7.

Theresa M. Bedarard

Year Born 1981

Manager of Trading and Investment

Prior to joining Mercer Advisors in 2021, Theresa held multiple operations and compliance positions with McGee Wealth Management, Inc. (MWM), an SEC independent registered investment advisor in Portland, Oregon. For MWM, she led the investment operations committee, helped develop investment strategy and provided research and relevant information to help the advisor team serve their clients. She earned her B.A. in Social and Behavior Science with a concentration in Criminal Justice at Seton Hall University in New Jersey in 2003.

Item 3 - Disclosure and/or Disciplinary Information

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. There is NO applicable information to disclose about Theresa M. Bedard for this item.

Other public information on Theresa M. Bedard is available on the SEC's website at www.adviserinfo.sec.gov.

Item 4 – Other Outside Business Activities

Theresa M. Bedard does engage in other outside business activities.

Theresa is owner of a rental property in Troutdale, OR. She spends about 1 hour per month on this activity. This activity is not investment related. See compensation information in Item 5.

Item 5 – Additional Compensation

Theresa receives compensation as owner of the rental property.

Item 6 – Supervision

Mrs. D. Linette Dobbins, Senior Lead Advisor & Branch Manager for Mercer Global Advisors Inc., has supervisory responsibilities for Theresa M. Bedard. Mrs. Dobbins can be reached at (503) 597-2222.

Designation Minimum Qualifications

Theresa M. Bedard holds the following licenses and/or credentials: Series 66 license

Please see designation and/or credentialing descriptions starting on page 7.

Designation and Degree Minimum Qualifications

CERTIFIED FINANCIAL PLANNER™ (CFP®) CERTIFICATION

The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP (with flame design) marks (collectively, the “CFP® marks”) are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”). The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients. Currently, more than 62,000 individuals have obtained CFP® certification in the United States. To attain the right to use the CFP® marks, an individual must fulfill satisfactorily the following requirements:

Education: Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board’s studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a Bachelor’s degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP Board’s financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;

Examination: Pass the comprehensive CFP® Certification Examination. The examination includes case studies and client scenarios designed to test one’s ability to correctly diagnose financial planning issues and apply one’s knowledge of financial planning to real world circumstances;

Experience: Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and

Ethics: Agree to be bound by CFP Board’s *Standards of Professional Conduct*, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks: Continuing Education – Complete 30 hours of continuing education every two years, including two hours on the *Code of Ethics* and other parts of the *Standards of Professional Conduct*, to maintain competence and keep up with developments in the financial planning field; and Ethics – Renew an agreement to be bound by the *Standards of Professional Conduct*. The Standards prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients. CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board’s enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

CHARTERED FINANCIAL CONSULTANT® (ChFC®) DESIGNATION

A Chartered Financial Consultant® has completed the most extensive educational program required for any financial services credential. Each ChFC® has taken eight or more college-level courses on all aspects of financial planning from The American College, a non-profit educator with the highest level of academic accreditation. The average study time for the program is over 400 hours, and advisors frequently spend years earning this coveted distinction. Each ChFC® must also complete a minimum of 30 hours of continuing education every two years and must meet extensive experience requirements to ensure that each client receives comprehensive and current professional financial advice. Advisors with the ChFC® designation are required to serve clients with the highest level of professionalism. The authority to use the ChFC® mark is granted by the Certification Committee of the Board of Trustees of The American College, and that privilege is contingent upon adherence to strict ethical guidelines.