

Eric V. Schmid

Ted Buchan & Company

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April 2017

**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Eric V. Schmid that supplements the Ted Buchan & Company brochure. You should have received a copy of that brochure. Please contact Director of Operations - Kimberley Miller at kim@tedbuchan.com if you did not receive Ted Buchan & Company's brochure or if you have any questions about the contents of this supplement.

Additional information about Eric V. Schmid is available on the SEC's website at www.adviserinfo.sec.gov. The searchable IARD/ CRD number for Ted Buchan & Company is 140722.

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Educational Background and Business Experience

Eric V. Schmid

Year of Birth: 1972

Educational Background

- Bachelor's Degree in Engineering, Harvey Mudd College, 1995
- CFP®, Certified Financial Planner, May 2015
- AIF®, Accredited Investment Fiduciary, April 2013
- CCFS™ – Certified College Funding Specialist, Dec 2011
- CRTP – California Registered Tax Preparer, May 2012

Business Background

- Ted Buchan & Company, Partner, Registered Investment Advisor, 1/2017 – Present
- Ted Buchan & Company, Consultant, 1/2012 – 12/2016
- REVA Medical, Vice President Advanced Technology, 12/2010 – 12/2011
- REVA Medical, Vice President Engineering & Stent Development, 2/2007 – 12/2010
- REVA Medical, Program Director / Principal Engineer, 9/2003 – 2/2007
- REVA Medical, Manager of Design & Development / Principal Engineer, 3/2001-9/2003
- Apex Medical Technologies, Senior Development Engineer, 6/1995 – 2/2001

Certifications:

- **CFP®**, Certified Financial Planner, May 2015

This designation requires the candidate to take an approved educational program covering 89 topics defined by the CFP board. They must pass a comprehensive exam and complete additional tasks as outlined below

- You must hold a bachelor's degree or its equivalent in any discipline from an accredited college or university.
- You must have three years of relevant experience prior to being awarded the CFP® certification
- You must pass the Candidate Fitness Standards and background check

There is an annual requirement of 30 hours of continuing education in the finance industry by the advisor.

- **CCFS**TM, Certified College Funding Specialist, Dec 2011

This designation is solely offered through the ACCFS and is the nation's only professional education and certification program focused exclusively on college financial funding.

- **AIF**[®], Accredited Investment Fiduciary, April 2013

This designation represents a thorough knowledge of and ability to apply the fiduciary practices to your firm. There is an annual requirement of 6 hours of approved AIF[®] continuing education by the advisor.

- **CRTP**, California Registered Tax Preparer, May 2012

California law requires anyone who prepares or advises tax returns for a fee and is not an exempt preparer to register as a tax preparer with the California Tax Education Council (CTEC).

- Take a 60-hour [qualifying education course](#) from a CTEC approved provider within the past 18 months.
- Purchase a \$5,000 tax preparer bond from an insurance/surety agent.
- Obtain a Preparer Tax Identification Number (PTIN) from the Internal Revenue Service (IRS).
- Register and submit the \$33 registration fee [online](#).
- Annual requirement of 20 hours of continuing education

Disciplinary Information

Eric V. Schmid has not been found in guilty in any criminal or civil action. He has not been subject to any proceedings before the SEC, any other federal agency, any state regulatory agency or any foreign regulatory authority. He has not been in a SRO proceeding.

Other Business Activities

Eric V. Schmid has no outside business activities.

Additional Compensation

Eric V. Schmid does not receive any other economic benefits from his clients.

Supervision

Eric V. Schmid is 10% owner of the firm. Advice given to clients is noted in practice management system for the firm.

Requirements for State-Registered Advisers

A. In addition to the events listed in Item 3 of Part 2B, if Eric V. Schmid has been involved in one of the events listed below, disclose all material facts regarding the event.

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

- (a) an investment or an investment-related business or 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.

Eric V. Schmid has not been involved in any of the above listed events.

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 or 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.

Eric V. Schmid has not been involved in any of the above listed events.

B. If the Eric V. Schmid has been the subject of a bankruptcy petition, disclose that fact, the date the petition was first brought, and the current status.

Eric V. Schmid has not been involved with a bankruptcy petition.