

**Broadhurst Financial Advisors, Inc.**

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**<http://www.BroadhurstFinancial.com/>**

March 10, 2026

**PART 2B FORM ADV:  
Brochure Supplement**

Jeffrey B. Broadhurst

**Item 1 Cover Page**

This brochure supplement provides information about Jeffrey B. Broadhurst, MBA, CFA, CFP that supplements Broadhurst Financial Advisors, Inc. ("BFAI") brochure called Form ADV, Part 2A and/or Appendix 1. You should have received a copy of BFAI's brochure. Please go to <https://adviserinfo.sec.gov/firm/summary/132332> or contact BFAI at 866-404-8022 if you did not receive BFAI's brochure or if you have any questions about the contents of this supplement.

Additional information about Jeffrey B. Broadhurst is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov)

## Item 2 Educational Background and Business Experience

Jeffrey B. Broadhurst, MBA, CFA, CFP  
Born 1968, Sleepy Hollow, New York

Mr. Broadhurst is President and Senior Financial Advisor. Before starting Broadhurst Financial Advisors, Inc. in 2004 (and Index Only Portfolios in 2003), Mr. Broadhurst worked at Standard & Poor's rating agency in New York City. While there, Mr. Broadhurst was part of the Investment Services Division and evaluated fund managers using both qualitative and quantitative measures. Prior to S&P, Mr. Broadhurst was with Dresdner Kleinwort Wasserstein, the investment banking subsidiary of Dresdner Bank AG. He worked directly on Wall Street in debt capital markets, executing primary corporate bond transactions for U.S. based multi-national corporations. Mr. Broadhurst also performed credit analysis for Dresdner Bank's precious metals trading group.

### Formal Education:

2006 Awarded the Certified Financial Planner (CFP®) designation

The CFP® marks identify those individuals who have met the rigorous experience and ethical requirements of CFP Board, including having successfully completed financial planning coursework at an accredited college or university and passed the 6-hour comprehensive CFP® certification exam. The exam covers the following areas: Professional Conduct and Regulations, General Principles of Financial Planning, Risk Management and Insurance Planning, Investment Planning, Tax Planning, Retirement Savings and Income Planning, Estate Planning and Psychology of Financial Planning.

2004 Awarded the Chartered Financial Analyst (CFA®) charter

A Chartered Financial Analyst (CFA®) charter is a designation given to those who have completed the CFA® Program and completed acceptable work experience requirements. The CFA Program is a three-part exam that tests the fundamentals of investment tools, valuing assets, portfolio management, and wealth planning. The CFA Program is typically completed by those with backgrounds in finance, accounting, economics, or business. CFA charter holders earn the right to use the CFA designation after program completion, application, and acceptance by CFA Institute. CFA charterholders are qualified to work in senior and executive positions in investment management, risk management, asset management, and more.

1999 M.B.A. Case Western Reserve University, Cleveland, Ohio – Finance major

1994 B.Sc. The Queen's University at Kingston, Ontario, Canada – Engineering major

NASD – Series 65 (2004), Series 7 (1999), Series 63 (1999);

### Business Background:

06/2004-Present	Broadhurst Financial Advisors, Inc. (President)
03/2003-09/2004	Registered Rep with Quest Capital Strategies d.b.a. "Index Only Portfolios"
05/2002-04/2003	Standard & Poor's, Investment Services (Analyst of Fund Managers)
04/2001-05/2002	Not working
07/1999-03/2001	Dresdner Kleinwort Wasserstein (Investment Banker)
09/1998-05/1999	Case Western Reserve University, Weatherhead School of Business
03/1996-08/1998	Minerals Technologies, Inc., formerly a Pfizer Corp. division (Business Rep)
05/1995-02/1996	Minerals Technologies, Inc., formerly a Pfizer Corp. division (Business Rep)

### **Item 3 Disciplinary Information**

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that may affect your decision to do business with Jeffrey B. Broadhurst. Mr. Broadhurst does not currently have any disclosures that are applicable to this requirement.

### **Item 4 Other Business Activities**

Jeffrey B. Broadhurst is affiliated with Index Funds Advisors, Inc. (IFA) a SEC-Registered Investment Advisor. Broadhurst Financial Advisors may refer Clients to IFA for asset management under a solicitor agreement. Mr. Broadhurst is a solicitor for IFA. Broadhurst spends 5% of his time on IFA matters.

### **Item 5 Additional Compensation**

Broadhurst Financial Advisors is “Fee-Only” meaning we do not sell financial products or collect commissions from products recommended. BFA is solely compensated by what the Client pays us for our independent financial advice. The Advisor only recommends institutional, “no-load” funds. Generally, we do not have conflicts of interests with our Clients. If we do, we fully disclose those conflicts and explain them thoroughly to the Client.

Clients are free to implement our recommendations, or not. If the Client chooses to implement our recommended portfolios that use DFA funds, they must go through specially approved investment advisors. Broadhurst Financial Advisors is approved to use DFA funds. The Advisor does not receive any compensation from DFA. All DFA funds are no-load, institutional, asset-class funds.

Jeffrey B. Broadhurst, MBA, CFA, CFP is “Fee-Only” meaning he does not sell any products or collect commissions from products recommended. Broadhurst Financial Advisors is solely compensated by what the Client pays us for our independent financial advice.

### **Item 6 Supervision**

Jeffrey B. Broadhurst is the Chief Compliance Officer and Chief Investment Officer of the Firm. Jeffrey B. Broadhurst is not supervised by someone else because he is the Chief Compliance Officer at the Firm. As the Chief Compliance Officer, Jeffrey B. Broadhurst is responsible for ensuring that he adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm’s Code of Ethics and Compliance Manual. The phone number for Jeffrey B. Broadhurst is (215) 325-1595.