

Jamison Monroe

Monroe Vos Consulting, Inc.

1001 McKinney, Ste 1200

Houston, Texas 77002

713-227-0100

December 31, 2021

This Brochure Supplement provides information about Jamison Monroe (“Jim Monroe”, “Jim”, “his” or “he”) that supplements the Brochure of Monroe Vos Consulting, Inc. (“Monroe Vos”, “firm”, “our” and or “we”). When we use the words “you”, “your” and “client” we are referring to you as our client or our prospective client. You should have received a copy of that Brochure. Please contact Julie L. Swanson, President of Monroe Vos if you did not receive Monroe Vos’ Brochure or if you have any questions about the contents of this supplement.

Additional information about Jim Monroe is available on the SEC’s website at www.adviserinfo.sec.gov.

Item 2 - Educational Background and Business Experience

Jim Monroe was born in 1944.

He received a BBA in Management from Texas Christian University; Ft. Worth, Texas in 1967.

His Business background for preceding five (5) years includes:

<i>08/04 to Present</i>	Co-Chairman, CEO, CFO, Director of Corporate Values; Monroe Vos Consulting, Inc.
<i>07/96 to 10/2021</i>	<i>Director, Muni Principal, Treasurer; MV Securities Group, Inc.</i>
<i>12/94 to 08/04</i>	Chairman, CEO, Treasurer, Consultant; The Monroe Vos Consulting Group, Inc.
<i>12/94 to Present</i>	Lease Employee; Insperity (formerly Administaff)

Additionally, Jim Monroe has been an active member of the Board of Directors of the Investment Management Consultant's Association ("IMCA") and the Texas Christian University Alumni Board of Directors. He has also been a guest speaker for various organizations including the Investment Management Consultant's Association, the Financial Executive Institute, the American Society of Pension Actuaries, and the Southern Employee Benefits Conference. He has been interviewed on the subject of investment management consulting by numerous publications including Plan Sponsor Magazine, The Monitor, Registered Representative, Senior Consultant Magazine, Institutional Investor, Journal of Pension Planning Investing, Money Management Letter and Defined Contribution Plan Investing. Mr. Monroe serves on the United Methodist Men's Board of Directors.

Designations

Jim obtained the IMCA: Certified Investment Management AnalystSM ("CIMA[®]") in 1989. The CIMA certification signifies that an individual has met initial and on-going experience, ethical, education, and examination requirements for investment management consulting, including advanced investment management theory and application. Prerequisites for the CIMA certification are three years of financial services experience and an acceptable regulatory history. To obtain the CIMA certification, candidates must pass an online Qualification Examination, successfully complete a one-week classroom education program provided by a Registered Education Provider at an AACSB accredited university business school, and pass an online Certification Examination. CIMA designees are required to adhere to IMCA's Code of Professional Responsibility, Standards of Practice, and Rules and Guidelines for Use of the Marks. CIMA designees must report 40 hours of continuing education credits, including two ethics hours, every two years to maintain the certification. The designation is administered through Investment Management Consultants Association ("IMCA[®]").

Item 3 - Disciplinary Information

There is no material information or facts regarding any legal or disciplinary events that would-be material to your evaluation of Jim's integrity, or the investment advisory services provided by Jim through us.

Item 4 - Other Business Activities

Advisory Board Member Activities

Jim Monroe is an advisory board member of two private funds, Montauk Tri Guard Management LLC and Estancia Capital Partners. In his capacity as advisory board member, Jim provides strategic advice to the funds and monitors their performance on behalf of advisory clients of Monroe Vos who have placed portfolio assets with the funds. Jim receives no compensation for his advisory board activities; however, he is reimbursed travel expenses to attend advisory meetings. Jim spends less than 14 hours per year with the two funds.

Other Business Activities

Jim Monroe is a manager of Monroe Holdings Company Distributed LLC and a Director/Chair on the Growth and Development Committee of National Math and Science Initiative. Jim attends board meetings and offers strategic advice. In addition, Jim Monroe is also the director of Monroe Book, Inc. Jim spends less than 20 hours per year on these activities.

Item 5 - Additional Compensation

Jim Monroe does not receive additional compensation from any third party for providing investment advisory services.

Item 6 - Supervision

Jim Monroe is supervised by Julie L. Swanson, President of Monroe Vos. Julie L. Swanson can be contacted by phone at 713-227-0100. Julie L. Swanson monitors the advisory activities of Jim through:

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- Review and approval of the opening of all new client accounts
 - Periodic and regular monitoring of trade activities
 - Periodic and regular monitoring of client correspondence, including e-mail
 - Periodic and regular monitoring of his personal trading activities including any account over which Jim has direct or indirect beneficial interest.
 - Periodic and regular monitoring of his outside business activities
 - Annual attestations of business and personal activities

Additionally, we maintain policies and procedures and a Code of Ethics to guide the supervision of our advisory activities.

Timothy J. Vos

Monroe Vos Consulting, Inc.

1001 McKinney, Ste 1200

Houston, Texas 77002

713-227-0100

December 31, 2021

This Brochure Supplement provides information about Timothy J. Vos (“Tim Vos”, “Tim”, “his” or “he”) that supplements the Brochure of Monroe Vos Consulting, Inc. (“Monroe Vos”, “firm”, “our” and or “we”). When we use the words “you”, “your” and “client” we are referring to you as our client or our prospective client. You should have received a copy of that Brochure. Please contact Julie L. Swanson, President of Monroe Vos if you did not receive Monroe Vos’ Brochure or if you have any questions about the contents of this supplement.

Additional information about Tim Vos is available on the SEC’s website at www.adviserinfo.sec.gov.

Item 2 - Educational Background and Business Experience

Tim Vos was born in 1956.

He participated in the Liberal Arts and Engineering program at Calvin University; Grand Rapids, Michigan.

His business background for the preceding five (5) years includes:

12/94 to 08/04	President, COO, Consultant; The Monroe Vos Consulting Group, Inc.
04/05 to 10/2021	President, COO, CCO, CEO, Director; MV Securities Group, Inc.
01/05 to 04/05	President, CEO, Director; MV Securities Group, Inc.
11/94 to 12/04	President, COO; MV Securities Group, Inc.
08/04 to Present	Co-Chairman, Director of Research; Monroe Vos Consulting, Inc.
12/94 to Present	Lease Employee; Insuperity (formerly Administaff)

Designations

Tim obtained a Certified Investment Management Analyst (“CIMA®”) from Wharton School, University of Pennsylvania in 1989. The CIMA® certification signifies that an individual has met initial and on-going experience, ethical, education, and examination requirements for investment management consulting, including advanced investment management theory and application. Prerequisites for the CIMA® certification are three years of financial services experience and an acceptable regulatory history. To obtain the CIMA certification, candidates must pass an online Qualification Examination, successfully complete a one-week classroom education program provided by a Registered Education Provider at an AACSB accredited university business school, and pass an online Certification Examination. CIMA® designees are required to adhere to IMCA's Code of Professional Responsibility, Standards of Practice, and Rules and Guidelines for Use of the Marks. CIMA® designees must report 40 hours of continuing education credits, including two ethics hours, every two years to maintain the certification. The designation is administered through Investment Management Consultants Association (“IMCA®”).

Tim also earned the ACCREDITED INVESTMENT FIDUCIARY AUDITOR™ (or “AIFA”) professional designation, awarded by the Center for Fiduciary Studies, which is associated with the University of Pittsburgh, and certifies him to conduct investment fiduciary audits and/or reviews. He has been active in his community where he has served as area coordinator for Recycle Unlimited and president of several community associations. He is currently registered with the Financial Industry Regulatory Authority, and Investment Management Consultant’s Association and is a Registered Investment Advisor.

Item 3 - Disciplinary Information

There is no material information or facts regarding any legal or disciplinary events that would-be material to your evaluation of Tim’s integrity, or the investment advisory services provided by Tim through us.

Item 4 - Other Business Activities

Tim Vos does not have any other business activities.

Item 5 - Additional Compensation

Tim Vos does not receive additional compensation from any third party for providing investment advisory services.

Item 6 - Supervision

Tim Vos is supervised by Julie L. Swanson, President of Monroe Vos. Julie L. Swanson can be contacted by phone at 713-227-0100. Julie L. Swanson monitors the advisory activities of Tim through:

- Review and approval of the opening of all new client accounts
- Periodic and regular monitoring of trade activities
- Periodic and regular monitoring of client correspondence, including e-mail
- Periodic and regular monitoring of his personal trading activities including any account over which Tim has direct or indirect beneficial interest.
- Periodic and regular monitoring of his outside business activities
- Annual attestations of business and personal activities

Additionally, we maintain policies and procedures and a Code of Ethics to guide the supervision of our advisory activities.

Timothy A. R. Callahan

2000 A South Bridge Parkway, Ste 520

Birmingham, AL 35209

(205) 879-6824

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1001 McKinney, Ste 1200

Houston, Texas 77002

713-227-0100

December 31, 2021

This Brochure Supplement provides information about Timothy A. R. Callahan (“Tim Callahan”, “Tim”, “his” or “he”) that supplements the Brochure of Monroe Vos Consulting, Inc. (“Monroe Vos”, “firm”, “our” and or “we”). When we use the words “you”, “your” and “client” we are referring to you as our client or our prospective client. You should have received a copy of that Brochure. Please contact Julie L. Swanson, President of Monroe Vos if you did not receive Monroe Vos’ Brochure or if you have any questions about the contents of this supplement.

Additional information about Tim Callahan is available on the SEC’s website at www.adviserinfo.sec.gov.

Item 2 - Educational Background and Business Experience

Tim Callahan was born in 1948.

He is a graduate of Birmingham-Southern College and The School of Bank Marketing at the University of Colorado.

His business background for the preceding five (5) years includes:

<i>08/04 to Present</i>	Executive Vice President; Monroe Vos Consulting, Inc.
<i>11/96 to 10/2021</i>	Senior Vice President, Registered Representative; MV Securities Group, Inc.
<i>08/96 to 08/04;</i>	Consultant, Senior Vice President; The Monroe Vos Consulting Group, Inc.
<i>08/96 to Present</i>	Lease Employee, Insperity (formerly Administaff)

He was past President of the Birmingham-Southern College National Alumni Association and a past President of the Alabama Security Dealers Association.

Item 3 - Disciplinary Information

There is no material information or facts regarding any legal or disciplinary events that would be material to your evaluation of Tim's integrity, or the investment advisory services provided by Tim through us.

Item 4- Other Business Activities

Tim Callahan does not have any other business activities.

Item 5 - Additional Compensation

Tim Callahan does not receive additional compensation from any third party for providing investment advisory services.

Item 6 - Supervision

Tim Callahan is supervised by Julie L. Swanson, President of Monroe Vos. Julie L. Swanson can be contacted by phone at 713-227-0100. Julie L. Swanson monitors the advisory activities of Tim through:

- Review and approval of the opening of all new client accounts
- Periodic and regular monitoring of trade activities
- Periodic and regular monitoring of client correspondence, including e-mail
- Periodic and regular monitoring of his personal trading activities including any account over which Tim Callahan has direct or indirect beneficial interest.
- Periodic and regular monitoring of his outside business activities
- Annual attestations of business and personal activities

Additionally, we maintain policies and procedures and a Code of Ethics to guide the supervision of our advisory activities.

Jason Martinez

Monroe Vos Consulting, Inc.

1001 McKinney, Ste 1200

Houston, Texas 77002

713-227-0100

December 31, 2021

This Brochure Supplement provides information about Jason Martinez (“Jason Martinez”, “Jason”, “his” or “he”) that supplements the Brochure of Monroe Vos Consulting, Inc. (“Monroe Vos”, “firm”, “our” and or “we”). When we use the words “you”, “your” and “client” we are referring to you as our client or our prospective client. You should have received a copy of that Brochure. Please contact Julie L. Swanson, President of Monroe Vos if you did not receive Monroe Vos’ Brochure or if you have any questions about the contents of this supplement.

Additional information about Jason Martinez is available on the SEC’s website at www.adviserinfo.sec.gov.

Item 2 - Educational Background and Business Experience

Jason Martinez was born in 1977.

He received a BBA in Business Administration, Finance and Business Economics from the University of Notre Dame.

His business background for the preceding five (5) years includes:

<i>01/06 to Present</i>	Senior Consultant, Director of Defined Contribution, Investment Advisor Representative; Monroe Vos Consulting, Inc.
<i>09/03 to 01/06</i>	Analyst, Investment Advisor Representative; The Monroe Vos Consulting Group, Inc.
<i>04/03 to 10/2021</i>	Registered Representative; MV Securities Group, Inc.
<i>03/02 to Present</i>	Lease Employee; Insperity (formerly Administaff)

Designations

Jason obtained a Certified Investment Management Analyst (“CIMA®”) in 2005. The CIMA® certification signifies that an individual has met initial and on-going experience, ethical, education, and examination requirements for investment management consulting, including advanced investment management theory and application. Prerequisites for the CIMA® certification are three years of financial services experience and an acceptable regulatory history. To obtain the CIMA certification, candidates must pass an online Qualification Examination, successfully complete a one-week classroom education program provided by a Registered Education Provider at an AACSB accredited university business school, and pass an online Certification Examination. CIMA® designees are required to adhere to IMCA's Code of Professional Responsibility, Standards of Practice, and Rules and Guidelines for Use of the Marks. CIMA® designees must report 40 hours of continuing education credits, including two ethics hours, every two years to maintain the certification. The designation is administered through Investment Management Consultants Association (“IMCA®”).

Item 3 - Disciplinary Information

There is no material information or facts regarding any legal or disciplinary events that would be material to your evaluation of Jason’s integrity, or the investment advisory services provided by Jason through us.

Item 4 - Other Business Activities

Advisory Board Member Activities

Jason Martinez is an advisory board member of John Hancock Mid-Market Advisory Board. In his capacity as advisory board member, Jason provides virtual feedback to John Hancock on the retirement offering. Jason spends less than 8 hours per year on this activity.

Item 5 - Additional Compensation

Jason Martinez does not receive additional compensation from any third party for providing investment advisory services.

Item 6 - Supervision

Jason Martinez is supervised by Julie L. Swanson, President of Monroe Vos. Julie L. Swanson can be contacted by phone at 713-227-0100. Julie L. Swanson monitors the advisory activities of Jason through:

- Review and approval of the opening of all new client accounts
- Periodic and regular monitoring of trade activities
- Periodic and regular monitoring of client correspondence, including e-mail
- Periodic and regular monitoring of his personal trading activities including any account over which Jason has direct or indirect beneficial interest.
- Periodic and regular monitoring of his outside business activities
- Annual attestations of business and personal activities

Additionally, we maintain policies and procedures and a Code of Ethics to guide the supervision of our advisory activities.