

*This brochure supplement provides information about Kevin Edward Flint that supplements the Mount Tamalpais Asset Management, LLC brochure. You should have received a copy of that brochure. Please contact Kevin Edward Flint if you did not receive Mount Tamalpais Asset Management, LLC's brochure or if you have any questions about the contents of this supplement.*

*Additional information about Kevin Edward Flint is also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).*



# TAMALPAIS

## ASSET MANAGEMENT

### MOUNT TAMALPAIS ASSET MANAGEMENT. LLC

#### FORM ADV PART 2B – INDIVIDUAL DISCLOSURE BROCHURE

FOR

**KEVIN EDWARD FLINT**  
PERSONAL CRD NUMBER: 3024399  
INVESTMENT ADVISER REPRESENTATIVE

Mount Tamalpais Asset Management, LLC  
13633 Southern Magnolia Drive  
Dade City, FL 33525  
(716) 998-1584  
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UPDATED: 09/12/2023

## Item 2: Educational Background and Business Experience

**Name:** Kevin Edward Flint                      **Born:** 1950

### **Educational Background and Professional Designations:**

#### **Education:**

Master of Arts Finance, The Ohio State University - 1972

#### **Designations:**

##### **CFP® - Certified Financial Planner**

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.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill 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:

- i. Continuing Education – Complete 30 hours of continuing education hours 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
- ii. 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.

### **Business Background:**

10/2022 - Present	Advisor Mount Tamalpais Asset Management, LLC
05/2021 - 10/2022	Advisor Calamar Financial Group / Calamar Capital Management

### **Item 3: Disciplinary Information**

There are no legal or disciplinary events that are material to a client’s or prospective client’s evaluation of this advisory business.

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

Kevin Edward Flint is an owner of rental properties.  
Kevin Edward Flint is a photographer at Kevin Flint Photography.  
Kevin Edward Flint is a managing member at Calamar Financial Group, LLC.  
Kevin Edward Flint is a managing member at Sage Path Advisory Services, LLC.

### **Item 5: Additional Compensation**

Kevin Edward Flint does not receive any economic benefit from any person, company, or organization, other than Mount Tamalpais Asset Management, LLC in exchange for providing clients advisory services through Mount Tamalpais Asset Management, LLC.

## **Item 6: Supervision**

As a representative of Mount Tamalpais Asset Management, LLC, Kevin Edward Flint is supervised by Michael Bristow, the firm's Chief Compliance Officer. Michael Bristow is responsible for ensuring that Kevin Edward Flint 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 Michael Bristow is (415) 722-2188.

## Item 7: Requirements For State Registered Advisers

*This disclosure is required by state securities authorities and is provided for your use in evaluating this investment advisor representative's suitability.*

- A. Kevin Edward Flint has NOT been involved in any of the events listed below.
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.
  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.
- B. Kevin Edward Flint has NOT been the subject of a bankruptcy.