
Lange Financial Group, LLC

2200 Murray Avenue
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Form ADV Part 2A – Firm Brochure

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Dated November 24, 2025

This brochure provides information about the qualifications and business practices of Lange Financial Group, LLC. If you have any questions about the contents of this brochure, please contact us at 412-521-2732. The information in this brochure has not been approved or verified by the United States Securities and Exchange Commission or by any state securities authority.

Additional information about Lange Financial Group, LLC is also available on the SEC's website at www.adviserinfo.sec.gov. The searchable IARD/CRD number for Lange Financial Group, LLC is 118684.

Lange Financial Group, LLC is a registered investment adviser. Registration with the United States Securities and Exchange Commission or any state securities authority does not imply a certain level of skill or training.

Item 2: Material Changes

Since the last annual filing dated March 26, 2024, there have been no material changes.

In the future, any material changes made during the year will be reported here.

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Item 4: Advisory Business

Description of Advisory Firm

Lange Financial Group, LLC's ("LFG") registration was granted by the Pennsylvania Securities Commission on May 17, 2002, by the State of Ohio on August 25, 2005, by the Commonwealth of Virginia on January 9, 2006, by the state of New York on June 15, 2006, by the state of Arizona on February 3, 2021, by the state of Florida on September 13, 2022, and by the state of Texas on October 22, 2024. James M. Lange (CRD Number 4382898) is Managing Member of LFG. Mr. Lange owns one hundred (100%) percent of the equity of LFG. LFG is not publicly owned or traded. There are no indirect owners of LFG or intermediaries who have any ownership interest in LFG. LFG does not engage in direct asset management.

Promoter Activity

Firm refers clients to Independent Manager(s), acting in the capacity as a Promoter. Should client engage those Independent Manager(s), Firm shall be compensated for its services by receipt of a fee to be paid directly by Independent Manager(s) to LFG in accordance with the requirements of Rule 206(4)-1 of the Investment Advisers Act of 1940, as amended, and any corresponding state securities laws or requirements.

Financial Planning

LFG may provide its clients with a broad range of comprehensive financial planning and consulting services (including non-investment related matters). Financial planning and consulting services consist of analyzing and evaluating the client's financial status, determining long-term financial goals, and tax planning to help achieve those goals. In performing its services, LFG shall not be required to verify any information received from the client or from the client's other professionals and is expressly authorized to rely thereon.

Educational Seminars

We may provide educational seminars on an "as announced" basis for groups seeking general advice on investments and other areas of personal finance. The content of these seminars will vary depending upon the needs of the attendees. These seminars are purely educational in nature and do not involve the sale of any investment products. Information presented will not be based on any one individual person's needs, nor do we provide individualized investment advice to attendees during these seminars. We do not charge for educational seminars.

Newsletter

LFG offers a monthly newsletter, "*Lange Report*", at no cost to subscribers. The *Lange Report* contains general financial information, designed to be educational and informative, not to provide investment advice.

Client Tailored Services and Client Imposed Restrictions

We offer the same suite of services to all of our clients and as a solicitor do not tailor our services to the individual needs of the client, other than which Independent Manager to refer them to.

Item 5: Fees and Compensation

The compensation to be paid to LFG by the Independent Manager for such services shall normally be an amount equal to 50% of the fees charged by the Independent Manager. This fee may be higher or lower depending on the agreement between LFG and the Independent Manager. Any such fee shall be paid solely from the Independent Manager(s)' standard investment management fee and shall not result in any additional charge to the client. The Independent Manager(s)' fee would be the same, regardless of whether a promotion fee is paid. In addition to the designated Independent Manager(s)' written disclosure statement, the client shall also receive LFG's written Disclosure Statement. These documents specify the percentage of the fee to be received by LFG.

LFG currently solicits for the following Independent Managers:

- Fort Pitt Capital Group, LLC (CRD# 281385) – Maximum fee of 1.00%.
- DiNuzzo Private Wealth, Inc. (CRD# 112778) – Maximum fee of 1.25%
- Buckingham Strategic Wealth, LLC (CRD# 143323) –Maximum fee of 1.00%
- JFS Wealth Advisors, LLC (CRD# 145051) – Maximum fee of 1.25%

Please refer to the Form ADV Part 2A of the Independent Manager for further detail.

Financial Planning

Financial planning services are included in the fee LFG receives from the Independent Manager.

Newsletter

LFG provides the newsletter at no cost to subscribers.

Other Types of Fees and Expenses

Clients may incur certain charges imposed by custodians, brokers, and other third parties such as custodial fees, advisory fees, deferred sales charges, odd-lot differentials, transfer taxes, wire transfer and electronic fund fees, and other fees and taxes on brokerage accounts and securities transactions. Mutual fund and exchange traded funds also charge internal management fees, which are disclosed in a fund's prospectus. Such charges, fees and commissions are exclusive of and in addition to our fee, and we shall not receive any portion of these commissions, fees, and costs.

Item 12, of the Form ADV Part 2A for the applicable Independent Manager, further describes the factors that they consider in selecting or recommending broker-dealers for client's transactions and determining the reasonableness of their compensation (e.g., commissions).

Item 6: Performance-Based Fees and Side-By-Side Management

None. No advisory fee shall be based on capital gains or capital appreciation of assets.

Item 7: Types of Clients

Individuals, trusts, estates, and charitable organizations.

Item 8: Methods of Analysis, Investment Strategies and Risk of Loss

As a solicitor, LFG does not use methods of analysis or have investment strategies. Clients referred to Independent Managers can review their Form ADV Part 2A for information on this topic.

Item 9: Disciplinary Information

None.

Item 10: Other Financial Industry Activities and Affiliations

LFG may recommend the services of its affiliated accounting firm, its affiliated law firm, its affiliated insurance firm, independent investment manager(s), and/or other professionals for implementation purposes. Clients are advised that a potential conflict of interest exists if LFG recommends the services of its affiliated entities. The client is under no obligation to act upon any of the recommendations made by LFG and/or engage the services of any such recommended professional (including LFG's affiliated entities). The client retains absolute discretion over all such implementation decisions and is free to accept or reject any recommendation from LFG.

The sole member of LFG, James Lange, spends approximately 55% of his time on business activities other than investment advisory activities. James Lange offers and is compensated for information products relating to retirement and estate planning. These include seminars, recordings of seminars, transcripts of seminars, professional courses and books.

LFG does not render accounting advice or tax preparation services to its clients. Rather, to the extent that a client requires accounting advice and/or tax preparation services, LFG, if requested, will recommend the services of a certified public accountant, all of which services shall be rendered independent of LFG pursuant to a separate agreement between the client and the certified public accountant. LFG shall not receive any of the fees charged by any recommended certified public accountant, referral or otherwise. Specifically, the sole member of LFG, James Lange, is also the Managing Member of Lange Accounting Group ("LAG"), a certified public accounting firm located in Pittsburgh, Pennsylvania. Additionally, certain of LFG's Associated Persons also serve as accountants with LAG. As discussed above, to the extent that LAG provides accounting and/or tax preparation services to any of LFG's clients, all such services shall be performed by LAG, in its separate capacity,

independent of LFG, for which services LFG shall not receive any portion of the fees charged by LAG, referral or otherwise. Although LFG shall not receive referral fees from LAG, Mr. Lange shall be entitled to receive distributions relative to his ownership interest in LAG.

It is also expected that Mr. Lange, along with those IARs of LFG who also serve as accountants for LAG, solely incidental to their respective practices as accountants with LAG, shall recommend LFG's services to certain of LAG's clients. Although LAG shall not receive referral fees from LFG, Mr. Lange shall receive referral fees from LFG, Mr. Lange shall be entitled to receive distributions relative to his ownership interest in LFG. Those IARs of LFG who also serve as accountants for LAG may also receive bonus income as a result of the recommendation of LFG's services to LAG's clients.

The accounting services provided by LAG include tax return preparations for individuals and businesses, business valuations, audits.

The sole member of LFG, James Lange, is a licensed practicing attorney admitted to the Bar of the Commonwealth of Pennsylvania.

LFG does not render legal services to its clients. LFG shall not receive any of the fees charged by any attorney. The sole member of LFG, James Lange, is also the Managing Member of Lange Legal Group LLC ("LLG"), a law firm located in Pittsburgh, Pennsylvania. LLG no longer provides legal services. Rather, to the extent that a client requires legal services, LLG, if requested, will recommend the services of an attorney.

No portion of any services rendered by LFG to its clients should be interpreted as legal advice. Rather, clients should defer to the advice of their own independent attorney.

LFG does not render insurance services to its clients. Rather, to the extent that a client requires insurance services, LFG, if requested, will recommend the services of a licensed insurance agent, all of which services shall be rendered independent of LFG pursuant to a separate agreement between the client and the insurance agent. LFG shall not receive any of the fees charged by any recommended insurance agents, referral or otherwise. Specifically, the sole member of LFG, James Lange, is also the Managing Member of Lange Life Care, LLC, a licensed insurance agency located in Pittsburgh, Pennsylvania. Additionally, other of LFG's IARs also serves as an agent with Lange Life Care. As discussed above, to the extent that Lange Life Care provides insurance services to any of LFG's clients, all such services shall be performed by Lange Life Care, in its separate capacity, independent of LFG, for which services LFG shall not receive any portion of the fees charged by Lange Life Care, referral or otherwise. Although LFG shall not receive referral fees from Lange.

Life Care, Mr. Lange shall be entitled to receive distributions relative to his ownership interest in Lange Life Care. Mr. Lange is licensed to sell insurance products through Lange Life Care.

It is also expected that Mr. Lange, along with the IAR of LFG who also serves as an agent for Lange Life Care, solely incidental to their respective practices as agents with Lange Life Care, shall recommend LFG's services to certain of Lange Life Care's Clients. Although Lange Life Care shall not receive referral fees from LFG, Mr. Lange shall receive referral fees from LFG. Mr. Lange shall be entitled to receive distributions relative to his ownership interest in LFG. Those IARs of LFG who also serve as agents for Lange Life Care may also receive a portion of the advisory fee as a result of the recommendation of LFG's services to Lange Life Care's clients.

The insurance products offered by Lange Life Care, LLC include life insurance, long term care insurance, and annuities.

Item 11: Code of Ethics, Participation or Interest in Client Transactions and Personal Trading

It is noted that LFG is in and shall continue to be in total compliance with The Insider Trading and Securities Fraud Enforcement Act of 1988. Specifically, LFG has adopted a firm wide policy statement outlining insider trading compliance by LFG and its associated persons and other employees. This statement has been distributed to all associated persons and other employees of LFG and has been signed and dated by each such person. A copy of such firm wide policy is left with such person and the original is maintained in a master file. Further, LFG has adopted a written supervisory procedures statement highlighting the steps which shall be taken to implement the firm wide policy. These materials are also distributed to all associated persons and other employees of LFG, are signed, dated and filed with the insider trading compliance materials. There are provisions adopted for (1) restricting access to files, (2) providing continuing education, (3) restricting and/or monitoring trading on those securities of which LFG's employees may have non-public information, (4) requiring all of LFG's employees to conduct their trading through a specified broker or reporting all transactions promptly to LFG, and (5) monitoring the securities trading of the firm and its employees and associated persons.

LFG or individuals associated with LFG may buy or sell securities identical to those recommended to customers for their personal account.

It is the expressed policy of LFG that no person employed by LFG may purchase or sell any security prior to a transaction(s) being implemented for an advisory account, and therefore, preventing such employees from benefiting from transactions placed on behalf of advisory accounts.

LFG or any related person(s) may have an interest or position in a certain security(ies) which may also be recommended to a client.

As these situations may represent a conflict of interest, LFG has established the following restrictions in order to ensure its fiduciary responsibilities:

- 1) A director, officer or employee of LFG shall not buy or sell securities for their personal portfolio(s) where their decision is substantially derived, in whole or in part, by reason of his or her employment unless the information is also available to the investing public on reasonable inquiry. No person of LFG shall prefer his or her own interest to that of the advisory client.
- 2) LFG maintains a list of all securities holdings for itself, and anyone associated with this advisory practice. These holdings are reviewed on a regular basis by James Lange.
- 3) LFG requires that all individuals must act in accordance with all applicable federal and state regulations governing registered investment advisory practices.

4) Any individual not in observance of the above may be subject to termination.

The firm has adopted a written Code of Ethics in compliance with SEC rule 204A-1. The code sets forth standards of conduct and requires compliance with federal securities laws. Our code also addresses personal trading and requires our personnel to report their personal securities holdings and transactions to the Chief Compliance Officer of the firm. We will provide a copy of our Code of Ethics to any client or prospective client upon request.

Investment Advice Relating to Retirement Accounts

When we provide investment advice to you regarding your retirement plan account or individual retirement account, we are fiduciaries within the meaning of Title I of the Employee Retirement Income Security Act and/or the Internal Revenue Code, as applicable, which are laws governing retirement accounts. The way we make money creates some conflicts with your interests, so we operate under a special rule that requires us to act in your best interest and not put our interest ahead of yours. Under this special rule's provisions, we must:

- Meet a professional standard of care when making investment recommendations (give prudent advice);
- Never put our financial interests ahead of yours when making recommendations (give loyal advice);
- Avoid misleading statements about conflicts of interest, fees, and investments;
- Follow policies and procedures designed to ensure that we give advice that is in your best interest;
- Charge no more than is reasonable for our services; and
- Give you basic information about conflicts of interest.

In addition, and as required by this rule, we provide information regarding the services that we provide to you, and any material conflicts of interest, in this brochure and in your client agreement.

Item 12: Brokerage Practices

Not applicable as the firm uses the services of third-party portfolio management firms.

Item 13: Review of Accounts

LFG will work with clients to obtain current information regarding their assets and investment holdings and either James Lange, Managing Member, Steven Kohman, Investment Advisor Representative, Jennifer Hall, CFP®, Managing CPA, or Dominic Bonaccorsi, Investment Advisor Representative, will review this information, at least annually, as part of our financial planning services. LFG does not provide specific reports to clients, other than financial plans.

Item 14: Client Referrals and Other Compensation

When LFG refers a client to Independent Manager(s), LFG shall be acting in the capacity as a Promoter. Should

client, engage those Independent Manager(s), LFG shall be compensated for its services by receipt of a fee to be paid directly by Independent Manager(s) to LFG in accordance with the requirements of Rule 206(4)-1 of the Investment Advisers Act of 1940, as amended, and any corresponding state securities laws or requirements. The compensation to be paid to LFG by the Independent Manager for such services shall normally be an amount equal to 50% of the fees charged by the Independent Manager. This fee may be higher or lower depending on the agreement between LFG and the Independent Manager. Any such fee shall be paid solely from the Independent Manager(s)' standard investment management fee and shall not result in any additional charge to the client. The Independent Manager(s)' fee would be the same, regardless of whether a promotion fee is paid. In addition to the designated Independent Manager(s)' written disclosure statement, the client shall also receive LFG's written Disclosure Statement. These documents specify the percentage of the fee to be received by LFG.

Item 15: Custody

None.

Item 16: Investment Discretion

None.

Item 17: Voting Client Securities

The firm will not vote proxy statements on behalf of clients. Clients may contact firm with questions about proxies. Proxy statements are sent to the clients by the custodial firm.

Item 18: Financial Information

Registered investment advisers are required in this Item to provide you with certain financial information or disclosures about our financial condition. We have no financial commitment that impairs our ability to meet contractual and fiduciary commitments to clients, and we have not been the subject of a bankruptcy proceeding.

We do not have custody of client funds or securities, nor do we require the prepayment of fees of more than \$500 six months or more in advance.

Item 19: Requirements for State-Registered Advisers

James Lange

Born 1956

Post-Secondary Education:

- Pennsylvania State University—1977, B.S., Accounting
- Duquesne University – 1984, Juris Doctor, Law

Business Background:

- Lange Financial Group, LLC, Investment Advisor Representative, 5/2002–Present
- Lange Legal Group LLC, Attorney, 1/2008–Present
- Lange Accounting Group LLC, CPA/Attorney, 1/2008–Present
- Lange Life Care, LLC, Agent, 6/2002–Present
- Lincoln Financial Advisors Corp and Lincoln National Life Insurance Company,

Series 7 Exam Sponsors, Registered Rep, 4/2001-5/2001

Steven Kohman

Born 1959

Post-Secondary Education:

- University of South Florida – 1981, B.A., Accounting

Recent Business Background:

- Lange Financial Group, LLC, Investment Advisor Representative, 5/2002–Present
- Lange Life Care, LLC, Agent, 12/2002–Present
- Lange Accounting Group LLC, CPA, 1/1996–Present
- Kohman & Company, CPA, 1/1991–Present

Jennifer A. Hall, CFP®

Born 1967

Post-Secondary Education:

- La Roche College, Pittsburgh, PA – 1992, B.S., Finance

Recent Business Background:

- Lange Financial Group, LLC, Managing CPA and Investment Advisor Representative, 03/2024 - Present
- Lange Financial Group, LLC, Investment Advisor Representative, 05/2021 – 03/2024
- Pittsburgh CPA Services, PLLC, Tax Preparer, 01/2021 – Current
- E.G. Conley, P.C., Senior Manager, 10/1998 – 12/2020

Dominic J. Bonaccorsi

Born 1988

Post-Secondary Education:

- Washington and Jefferson College, Washington, PA, – 2010, B.A., Accounting

Recent Business Background:

- Lange Financial Group, LLC, Investment Advisor Representative, 09/2020 – Present
- Lange Accounting Group, CPA, 09/2020 – Present
- R.D. Hoag and Associates, LLC, CPA, 11/2015 – 09/2020
- K&L Gates, Tax Accountant, 12/2014 – 11/2015
- PwC, Senior Associate, 06/2010 – 12/2014

Professional Designations

CERTIFIED FINANCIAL PLANNER™ professional

I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and I may use these and CFP Board’s other certification marks (the “CFP Board Certification Marks”). The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at www.cfp.net.

CFP® professionals have met CFP Board’s high standards for education, examination, experience, and ethics. To become a CFP® professional, an individual must fulfill the following requirements:

- **Education** – Earn a bachelor’s degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials.
- **Examination** – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual’s ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.
- **Experience** – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.
- **Ethics** – Satisfy the *Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement* and agree to be bound by CFP Board’s *Code of Ethics and Standards of Conduct* (“Code and Standards”), which sets forth the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements to remain certified and maintain the right to continue to use the CFP Board Certification Marks:

- **Ethics** – Commit to complying with CFP Board’s *Code and Standards*. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional’s services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.
- **Continuing Education** – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with

developments in financial planning. Two of the hours must address the *Code and Standards*.

Certified Public Accountant (CPA) CPAs are licensed and regulated by their state boards of accountancy. While state laws and regulations vary, the education, experience and testing requirements for licensure as a CPA generally include minimum college education (typically 150 credit hours with at least a baccalaureate degree and a concentration in accounting), minimum experience levels (most states require at least one year of experience providing services that involve the use of accounting, attest, compilation, management advisory, financial advisory, tax or consulting skills, all of which must be achieved under the supervision of or verification by a CPA), and successful passage of the Uniform CPA Examination. In order to maintain a CPA license, states generally require the completion of 40 hours of continuing professional education (CPE) each year (or 80 hours over a two year period or 120 hours over a three year period). Additionally, all American Institute of Certified Public Accountants (AICPA) members are required to follow a rigorous Code of Professional Conduct which requires that they act with integrity, objectivity, due care, competence, fully disclose any conflicts of interest (and obtain client consent if a conflict exists), maintain client confidentiality, disclose to the client any commission or referral fees, and serve the public interest when providing financial services. The vast majority of state boards of accountancy have adopted the AICPA's Code of Professional Conduct within their state accountancy laws or have created their own.

Performance Based Fees

LFG is not compensated by performance-based fees.

Material Disciplinary Disclosures

No management person at LFG has ever been found liable in an arbitration claim, a civil, self-regulatory organization, or administrative proceeding.

Material Relationships That Management Persons Have with Issuers of Securities

We do not have any relationship or arrangement with issuers of securities.

Additional Information

The client may terminate the professional relationship with both the Independent Manager and LFG at any time by notification in writing to the Independent Manager. LFG can terminate the relationship at any time by notification in writing to the client. In the event that either party terminates the professional relationship, any prepaid fee will be refunded pursuant to the terms of the client's contract with the Independent Manager. All fees that are due to be refunded to the client will be refunded by the Independent Manager. LFG will return its portion of the returned fee to the Independent Manager.

Lange Financial Group, LLC

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Form ADV Part 2A – Firm Brochure

Phone: 412-521-2732
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www.paytaxeslater.com

Dated November 24, 2025

Form ADV Part 2B – Brochure Supplement

For

James Lange
Steven Kohman
Jennifer Hall, CFP®
Dominic Bonaccorsi

This brochure supplement provides information about James Lange, Steven Kohman, Jennifer Hall and Dominic Bonaccorsi that supplements the Lange Financial Group, LLC brochure. You should have received a copy of that brochure. Please contact James Lange, Managing Member, if you did not receive LFG's brochure or if you have any questions about the contents of this supplement.

Additional information about Lange, Kohman, Hall and Bonaccorsi is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2: Educational Background and Business Experience

James Lange

Born 1956

Post-Secondary Education:

- Pennsylvania State University—1977, B.S., Accounting
- Duquesne University – 1984, Juris Doctor, Law

Business Background:

- Lange Financial Group, LLC, Investment Advisor Representative, 5/2002–Present
- Lange Legal Group LLC, Attorney, 1/2008–Present
- Lange Accounting Group LLC, CPA/Attorney, 1/2008–Present
- Lange Life Care, LLC, Agent, 6/2002–Present
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Series 7 Exam Sponsors, Registered Rep, 4/2001-5/2001

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Born 1959

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- Lange Financial Group, LLC, Investment Advisor Representative, 05/2021 – 03/2024
- Lange Accounting Group LLC, CPA – Tax Preparer, 05/2021 - Present
- Pittsburgh CPA Services, PLLC, Tax Preparer, 01/2021 – Current
- E.G. Conley, P.C., Senior Manager, 10/2008 – 12/2020

Dominic J. Bonaccorsi

Born 1988

Post-Secondary Education:

- Washington and Jefferson College, Washington, PA, – 2010, B.A., Accounting

Recent Business Background:

- Lange Financial Group, LLC, Investment Advisor Representative, 09/2020 – Present
- Lange Accounting Group, CPA, 09/2020 – Present
- R.D. Hoag and Associates, LLC, CPA, 11/2015 – 09/2020
- K&L Gates, Tax Accountant, 12/2014 – 11/2015
- PwC, Senior Associate, 06/2010 – 12/2014

Professional Designations**CERTIFIED FINANCIAL PLANNER™ professional**

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CFP® professionals have met CFP Board’s high standards for education, examination, experience, and ethics. To become a CFP® professional, an individual must fulfill the following requirements:

- **Education** – Earn a bachelor’s degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials.
- **Examination** – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual’s ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.
- **Experience** – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.
- **Ethics** – Satisfy the *Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement* and agree to be bound by CFP Board’s *Code of Ethics and Standards of Conduct* (“Code and Standards”), which sets forth the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements to remain certified and maintain the right to continue to use the CFP Board Certification Marks:

- **Ethics** – Commit to complying with CFP Board’s *Code and Standards*. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement

that includes a fiduciary obligation to the client.

- **Continuing Education** – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the *Code and Standards*.

Certified Public Accountant (CPA) CPAs are licensed and regulated by their state boards of accountancy. While state laws and regulations vary, the education, experience and testing requirements for licensure as a CPA generally include minimum college education (typically 150 credit hours with at least a baccalaureate degree and a concentration in accounting), minimum experience levels (most states require at least one year of experience providing services that involve the use of accounting, attest, compilation, management advisory, financial advisory, tax or consulting skills, all of which must be achieved under the supervision of or verification by a CPA), and successful passage of the Uniform CPA Examination. In order to maintain a CPA license, states generally require the completion of 40 hours of continuing professional education (CPE) each year (or 80 hours over a two year period or 120 hours over a three year period). Additionally, all American Institute of Certified Public Accountants (AICPA) members are required to follow a rigorous Code of Professional Conduct which requires that they act with integrity, objectivity, due care, competence, fully disclose any conflicts of interest (and obtain client consent if a conflict exists), maintain client confidentiality, disclose to the client any commission or referral fees, and serve the public interest when providing financial services. The vast majority of state boards of accountancy have adopted the AICPA's Code of Professional Conduct within their state accountancy laws or have created their own.

Item 3: Disciplinary Information

None.

Item 4: Other Business Activities

- James Lange is a member of the Pennsylvania Bar and is also a licensed Certified Public Account within the Commonwealth.
- Steven Kohman, Jennifer Hall and Dominic Bonaccorsi are all licensed Certified Public Accountant with the Commonwealth.
- Dominic Bonaccorsi is the sole proprietor of Bonaccorsi Tax and Accounting Service. It is not investment related.

Item 5: Additional Compensation

As described in Item 14 of the Form ADV Part 2A, pursuant to SEC Regulation Section 275.206.40-3, and applicable state laws, we have entered into “solicitor arrangements” with other registered investment advisers, who we refer to as Outside Managers in this Form ADV Part 2. At the time of solicitation, the prospective client is given full disclosure of the solicitation arrangement and the nature of the relationship between us and the other investment adviser.

Item 6: Supervision

Jennifer Hall supervises all of the above listed supervised persons and can be reached by phone at 412- 521-2732.

Item 7: Requirements for State Registered Advisers

James Lange, Steven Kohman, Jennifer Hall, and Dominic Bonaccorsi have NOT been found liable in an arbitration, civil, self-regulatory, or administrative proceeding, and has not been the subject of a bankruptcy petition.