

**Item 1: Cover Page
Part 2B of Form ADV: Brochure Supplement
February 2022**

Amir Monsefi



A I R E
A D V I S O R S

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**Firm Contact:
Amir Monsefi
Chief Compliance Officer**

This brochure supplement provides information about Mr. Monsefi that supplements our brochure. You should have received a copy of that brochure. Please contact Mr. Monsefi if you did not receive AIRE Advisors, LLC's brochure or if you have any questions about the contents of this supplement. Additional information about Mr. Monsefi is available on the SEC's website at www.adviserinfo.sec.gov by searching CRD #2394903.

Item 2: Educational Background & Business Experience

Amir Monsefi

Year of Birth: 1970

Educational Background:

- 2002: Anderson School of Business, UCLA; MBA in Finance and Entrepreneurship
- 1992: Brandeis University; Bachelor of Arts - Psychology

Business Background:

- 10/2020 – Present AIRE Advisors, LLC; Co-Founder, CEO, and CCO
- 12/2011 – 10/2020 Merrill Lynch; Sr. Resident Director
- 12/2006 – 12/2011 UBS Financial Services; Sales Manager

Exams, Licenses & Other Professional Designations:

- 2020: Certified Exit Planning Advisor, CEPA
- 2018: Certified Private Wealth Advisor, CPWA®
- 2018: Certified Plan Fiduciary Advisor, CPFA
- 2016: Accredited Wealth Management Advisor, AWMA®
- 2008: Series 3 Exam
- 2001: Series 65 Exam
- 2000: CA Insurance Licensed, License # 0B73277
- 1999: Series 8 Exam
- 1995: Series 31 Exam
- 1993: Series 7 & 63 Exams

Certified Exit Planning Advisor, CEPA

The CEPA designation is made available through the Exit Planning Institute (“EPI”). The CEPA program trains and certifies qualified professional advisers in the field of exit planning. Candidates must have or be: (1) 5 years of full-time or equivalent experience working directly with business owners as a financial advisor, attorney, CPA, business broker, investment banker, commercial lender, estate planner, insurance professional, business consultant or in a related capacity; (2) Undergraduate degree from a qualifying institution; if no qualifying degree must submit additional professional work experience (2 years of relevant professional experience may be substituted for each year of required undergraduate studies); and (3) Exit Planning Institute member in good standing. The CEPA Program offers professionals an innovative learning experience, performance-enhancing resources, and the strategic tools to help advance their exit planning practice.

Renewing certificants must have completed a minimum of 40 hours of exit planning related professional development, or a minimum of 30 hours of exit planning related professional development plus 10 hours of qualifying leadership, authorship, and teaching activities contributing to the exit planning profession. Qualifying leadership activities include volunteer service as a chairman, Chair-Elect, or officer for committee service to a qualifying organization other than the applicant's employer. Renewal applicants must again agree in writing that they will adhere to the EPI Professional Standards and Code of Ethics, and must re-attest that they have not been convicted of a felony related to the practice of exit planning.

Certified Private Wealth Advisor, CPWA®

The CPWA® designation signifies that an individual has met initial and on-going experience, ethical, education, and examination requirements for the professional designation, which is centered on private wealth management topics and strategies for high-net-worth clients. The designation is administered through The Investments & Wealth Institute (“IWI”) formerly known as the Investment Management Consultants Association. Prerequisites for the CPWA® designation are a Bachelor’s degree from an accredited college or university or one of the following designations or licenses: CIMA®, CIMC®, CFA®, CFP®, ChFC®, or CPA license; have an acceptable regulatory history as evidenced by FINRA Form U-4 or other regulatory requirements and five years of professional client-centered experience in financial services or a related industry. CPWA® designees have completed a rigorous educational process that includes self-study requirements, an in-class education component, and successful completion of a comprehensive examination. CPWA® designees are required to adhere to the institute’s *Code of Professional Responsibility and Rules and Guidelines for Use of the Marks*. CPWA® designees must report 40 hours of continuing education credits, including two ethics hours, every 2 years to maintain the certification.

Certified Plan Fiduciary Advisor, CPFA

The CPFA credential demonstrates an advisor’s knowledge, expertise and commitment to working with retirement plans. Plan advisors who earn their CPFA demonstrate the expertise required to act as a plan fiduciary or help plan fiduciaries manage their roles and responsibilities. To earn the CPFA credential candidates must pass the CPFA examination. CPFA coursework covers four key areas: 1. ERISA Fiduciary Roles and Responsibilities, 2. ERISA Fiduciary Oversight, 3. ERISA Plan Investment Management, and 4. ERISA Plan Management. The CPFA examination and standards are set by the National Association of Plan Advisors (“NAPA”). Following completion of the CPFA examination, 10 hours of continuing education on ethics/professionalism topic(s) are required annually to maintain the certification. Failure to earn continuing education credits will result in plan advisors CPFA certification being suspended until the appropriate continuing education credits are completed within the following year (i.e., plan advisors have 24 months to catch up for the entire 24 months’ worth of continuing education if they fall behind any time within that period).

Accredited Wealth Management Advisor, AWMA®

The College for Financial Planning® awards the AWMA® designation to students who successfully complete the program, pass the final examination and comply with the Code of Ethics, which includes agreeing to abide by the *Standards of Professional Conduct* and *Terms and Conditions*. Applicants must also disclose of any criminal, civil, self-regulatory organization, or governmental agency inquiry, investigation, or proceeding relating to their professional or business conduct. Conferment of the designation is contingent upon the College for Financial Planning’s review of matters either self-disclosed or which are discovered by the College that are required to be disclosed. Continued use of the AWMA® designation is subject to ongoing renewal requirements. Every 2 years individuals must renew their right to continue using the AWMA® designation by completing 16 hours of continuing education and reaffirming to abide by the *Standards of Professional Conduct, Terms and Conditions*, and self-disclose any criminal, civil, self-regulatory organization, or governmental agency inquiry, investigation, or proceeding relating to their professional or business conduct.

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Item 3: Disciplinary Information¹

There are no legal or disciplinary events material to the evaluation of Mr. Monsefi.

Item 4: Other Business Activities

Mr. Monsefi is a licensed insurance agent/broker. He may offer insurance products and receive customary fees as a result of insurance sales. A conflict of interest may arise as these insurance sales may create an incentive to recommend products based on the compensation earned. To mitigate this potential conflict, Mr. Monsefi, as a fiduciary, will act in the client's best interest.

Item 5: Additional Compensation

Mr. Monsefi does not receive any other economic benefit for providing advisory services in addition to advisory fees.

Item 6: Supervision

Sharon Nassir is a principal of Aire Advisors, LLC and as such supervises and monitors Mr. Monsefi's activities on a regular basis to ensure compliance with our firm's Code of Ethics. Please contact Ms. Nassir if you have any questions about Mr. Monsefi's brochure supplement at (310) 277-2473.

¹ Note: Our firm may, under certain circumstances, rebut the presumption that a disciplinary event is material. If an event is immaterial, we are not required to disclose it. When we review a legal or disciplinary event involving the advisor to determine whether it is appropriate to rebut the presumption of materiality, we consider all of the following factors: (1) the proximity of advisor to the advisory function; (2) the nature of the infraction that led to the disciplinary event; (3) the severity of the disciplinary sanction; and (4) the time elapsed since the date of the disciplinary event. If we conclude that the materiality presumption has been overcome, we prepare and maintain a file memorandum of our determination in our records. We follow SEC rule 204-2(a)(14)(iii) and similar state rules.