Item 1: Cover Page Part 2B of Form ADV: Brochure Supplement September 2021

# **Balfoure P. Brenes**



9350 Wilshire Blvd, Suite 200 Beverly Hills, CA 90212 <u>http://www.aireadvisors.com</u>

# Firm Contact: Amir Monsefi Chief Compliance Officer

This brochure supplement provides information about Mr. Brenes 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. Brenes is available on the SEC's website at www.adviserinfo.sec.gov by searching CRD # 6019811.

# Item 2: Educational Background & Business Experience

#### **Balfoure P. Brenes Year of Birth:** 1968

#### **Educational Background:**

- 1995: California State University, Northridge; Bachelor of Arts, Business/Finance
- 1991: Glendale College; Associate of Arts, Business

#### **Business Background:**

- 04/2021 Present AIRE Advisors, LLC; Wealth Advisor
- 09/2012 04/2020 Merrill Lynch; VP Wealth Advisor
- 01/2012 09/2012 Morgan Stanley; Financial Advisor
- 02/2007 01/2012 Bank of America; VP Business Banker

#### **Exams, Licenses & Other Professional Designations:**

• 2012: Series 7, 66, and California Insurance License

## Item 3: Disciplinary Information<sup>1</sup>

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

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

Mr. Brenes does not have any outside business activities to disclose at this time.

# **Item 5: Additional Compensation**

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

#### **Item 6: Supervision**

Amir Monsefi, Chief Compliance Officer of Aire Advisors, LLC supervises and monitors Mr. Brenes' activities on a regular basis to ensure compliance with our firm's Code of Ethics. Please contact Mr. Monsefi if you have any questions about Mr. Brenes' brochure supplement at (310) 277-2473.

<sup>&</sup>lt;sup>1</sup> 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.