

Item 1 – Cover Page

Allan MacDougall  
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This brochure supplement provides information about Allan MacDougall that supplements the MacDougall Financial Counseling brochure. You should have received a copy of that brochure. Please contact Allan MacDougall if you did not receive MacDougall Financial Counseling's brochure or if you have any questions about the contents of this supplement.

Additional information about Allan MacDougall is also available on the SEC's website at [www.advisorinfo.sec.gov](http://www.advisorinfo.sec.gov).

All client investments are prepared, reviewed and communicated to the client by Allan (Lanny) MacDougall III, majority owner, and Elizabeth L MacDougall, minority owner. There are two supervised persons, Kurtis Savage & Elizabeth L MacDougall, who assist in identifying and selecting appropriate mutual fund or ETF investments. We work collaboratively on all clients, thus all of us have direct client contact. We work out of the same office and share all communication. We do not recommend individual stocks but will give our opinion on any particular investment if asked by the client. We do not recommend hedge funds, private equity types of investments, or sub managers.

Here is the additional information required for Allan MacDougall and the two supervised people.

#### Item 2 – Educational Background and Business Experience

ALLAN (LANNY) MACDOUGALL III: Born 1949. BA 1973 Stanford University in Economics. Series 65 License and PA Insurance License for Life and Health. Worked for Mellon Bank from 1975 to 1984 in Credit Analysis and International Lending. Worked for the Bank of Boston and PNC Bank in Sydney, Australia from 1988 till 1993. Worked as CFO and COO for a high tech company in northern California and an Asian Importer in Pittsburgh. Joined Schofield Financial in 2006 forming Schofield-MacDougall Financial and finally sole owner and manager of MacDougall Financial since 2011.

ELIZABETH L. MACDOUGALL: Born 1995. BSBA 2018 University of Richmond in Business Administration: Finance Concentration. Series 65 License, Certified Private Wealth Advisor (CPWA®) professional. Worked for Aldrich Capital Partners from 2018 to 2019 as an Investment Team Analyst. Joined MacDougall Financial in August 2019 as a full-time employee. Became a partial owner of MacDougall Financial in 2023.

KURTIS J. SAVAGE: Born 1986. BA 2009 Duquesne University in Political Science. Series 65 License, Accredited Investment Fiduciary (AIF). Joined Schofield-MacDougall in March 2010 as a full-time employee.

#### Item 3 – Disciplinary Information

Allan MacDougall, Elizabeth L MacDougall and Kurtis Savage have no disciplinary history.

#### Item 4 – Other Business Activities

Allan MacDougall, Elizabeth L MacDougall and Kurtis Savage are not actively engaged in any investment related business or occupation.

Item 5 – Additional Compensation

Allan MacDougall, Elizabeth L MacDougall and Kurtis Savage do not receive any economic benefit for providing advisory services to anyone who is not a client.

Item 6 – Supervision

Allan MacDougall is responsible for supervising Kurtis Savage and Elizabeth L MacDougall ('supervised persons'). Allan MacDougall reviews the work of the supervised persons either in person or through access to all email correspondence.

Contact Information:

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