



**Investment Advisor Representative**

**George David Biddle Sr.**

**CRD # 2288780**

Shepherd Financial, LLC

5807 Kennett Pike

Wilmington, DE 19807

Phone: (302) 218-6738

September 20, 2024

**Associated with the following Registered Investment Advisor**

**Shepherd Financial Investment Advisory, LLC**

**CRD # 288623**

111 Congressional Boulevard, Suite 100

Carmel, Indiana 46032

Phone: (317) 975-5033

This brochure supplement provides information about your Investment Adviser Representative ("your Advisor"), George David Biddle Sr., who is registered and associated with Shepherd Financial Investment Advisory, LLC (Shepherd Financial Investment Advisory). This brochure is a supplement to the Shepherd Financial Investment Advisory Form ADV 2A brochures, of which you should have already received.

Additional information about your Investment Adviser Representative is available via the U.S. Securities and Exchange Commission's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

Please Note: If you have not received a copy of the Form ADV 2A brochure, please contact Steven M. Wylam, Chief Compliance Officer, at (317) 975-5034. Brochure requests and additional questions may also be directed to Shepherd Financial Investment Advisory at (317) 975-5033.

## **EDUCATIONAL BACKGROUND & BUSINESS EXPERIENCE**

George David Biddle Sr.  
Year of Birth: 1969

### **Education**

George David Biddle Sr. has not received any higher education degrees after high school.

### **Business Experience**

Investment Adviser Representative, Shepherd Financial Investment Advisory, LLC CRD # 288623,  
September 2024 – Present

President, Biddle Capital Management, November 1996 – Present

### **Professional Licenses / Designations**

Mr. Biddle holds and maintains the following securities and insurance licenses and registrations required to engage in the offering of securities and investment products.

Series 65 - Uniform Investment Adviser Law Examination

## **DISCIPLINARY INFORMATION**

Mr. Biddle has no material legal or disciplinary events to report.

## **OTHER BUSINESS ACTIVITIES**

Mr. Biddle is an investment adviser representative with another firm. From time to time, he will offer clients advice or products from this activity. Shepherd Financial Investment Advisory LLC always acts in the best interest of the client. Clients are in no way required to utilize the services of any representative of Shepherd Financial Investment Advisory LLC in such individual's outside capacity.

Mr. Biddle is a licensed insurance agent. This activity creates a conflict of interest since there is an incentive to recommend insurance products based on commissions or other benefits received from the insurance company, rather than on the client's needs. Additionally, the offer and sale of insurance products by supervised persons of Shepherd Financial Investment Advisory LLC are not made in their capacity as a fiduciary, and products are limited to only those offered by certain insurance providers. Shepherd Financial Investment Advisory LLC addresses this conflict of interest by requiring its supervised persons to act in the best interest of the client at all times, including when acting as an insurance agent. Shepherd Financial Investment Advisory LLC periodically reviews recommendations by its supervised persons to assess whether they are based on an objective evaluation of each client's risk profile and investment objectives rather than on the receipt of any commissions or other benefits. Shepherd Financial Investment Advisory LLC will disclose in advance how it or its supervised persons are compensated and will disclose conflicts of interest involving any advice or service provided. At no time will there be tying between business practices and/or services (a condition where a client or prospective client would be required to accept one product or service conditioned upon the selection of a second, distinctive tied product or service). No client is ever under any obligation to purchase any insurance product. Insurance products recommended by Shepherd Financial Investment Advisory LLC's supervised persons may also be available from other providers on more favorable terms, and clients can purchase insurance products recommended through other unaffiliated insurance agencies.

Mr. Biddle is into real estate holdings and data sales.

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## **ADDITIONAL COMPENSATION**

Please refer to the Fees and Compensation section in Shepherd Financial Investment Advisory's Form ADV 2A of which should have been provided to you by your Advisor. This section describes in detail the potential other forms of compensation, in addition to the advisory fee, that may be shared with Mr. Biddle and other Financial Advisors by Shepherd Financial Investment Advisory.

For non-advisory product purchases, your Advisor may receive a sales commission which may be in addition to any advisory fees received on your advisory assets. In these situations, your Advisor may be financially incentivized to offer you both non-advisory and advisory products and services.

## **SUPERVISION**

The individual responsible for monitoring the advisory activities of Mr. Biddle is Steven M. Wylam, Chief Compliance Officer. Mr. Wylam or his designee is responsible to review the recommended financial plans and transactions of your Financial Advisor. The Chief Compliance Officer provides an oversight of the activities occurring in your account(s). If you have any questions about the trading or recommendations in your account, please call Mr. Wylam at (317) 975-5033.