



Investment Advisor Representative

Kim Lynnette Astin

CRD # 7362738

Shepherd Financial, LLC

5807 Kennett Pike

Wilmington, DE 19807

Phone: (888) 369-2261

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”), Kim Lynnette Astin, 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.

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

Kim Lynnette Astin
Year of Birth: 1965

Education

JD Law, Rutgers Law School - 1993
BA Accounting, Rutgers University - 1987
BA Business Administration, Rutgers University - 1987

Business Experience

Investment Adviser Representative, Shepherd Financial Investment Advisory, LLC CRD # 288623, September 2024 – Present
Senior Wealth Advisor, Shepherd Financial LLC, September 2024 – Present
Director of Financial Planning, BCM Wealth Management, January 2020 – Present
Not Employed, None., January 2014 – December 2019

Professional Licenses / Designations

Ms. Astin 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

Ms. Astin has no material legal or disciplinary events to report.

OTHER BUSINESS ACTIVITIES

Ms. Astin is not engaged in any investment-related business or occupation (other than this advisory firm).

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 Ms. Astin 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 Ms. Astin 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.