



**Investment Advisor Representative**

**Matthew David Tandler**

**CRD # 6901139**

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"), Matthew David Tandler, 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**

Matthew David Tendler  
Year of Birth: 1987

### **Education**

Bachelors Accounting & Business, Neumann University - 2012

### **Business Experience**

Investment Adviser Representative, Shepherd Financial Investment Advisory, LLC CRD # 288623,  
February 2013 – Present

Director of Retirement Plans, Biddle Capital Management, February 2013 – Present

Head Men's NCAA Ice Hockey Coach and Assistance Athletic Director, Neumann University,  
October 2015 – August 2017

### **Professional Licenses / Designations**

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

## **OTHER BUSINESS ACTIVITIES**

Mr. Tendler is a Hockey Coach at Goalie Doctor, LLC, since 06/2012. This business is not investment related, and no time is spend during security trading hours.

## **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. Tendler 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. Tendler 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.