



**PART 2B OF FORM ADV:  
BROCHURE SUPPLEMENT**

**Mahesh A. Odhrani**

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**SUPERVISION**

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This Brochure Supplement provides information about Mahesh A. Odhrani that is an accompaniment to the Disclosure Brochures and Forms CRS for our firm, Cambridge Investment Research Advisors, Inc (CIRA) and affiliated broker-dealer, Cambridge Investment Research, Inc. (CIR). You should have received all of these together as a complete disclosure packet. If you did not receive our Disclosure Brochures or Forms CRS or if you have questions about this Brochure Supplement for Mahesh A. Odhrani, you are welcome to contact us through the information listed to the left.

Additional information about Mahesh A. Odhrani is available on the SEC website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov). Please be aware that not all states require registration and therefore your Financial Professional may not show up on the SEC website.

**Mahesh A. Odhrani**

**ChFC®, AIF®, CFP®, CPFA®**

CRD#: 4695218  
Year of Birth: 1980

**EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE**

**Education**

University of Nevada, Las Vegas, Bachelors in Finance and  
Management Info Systems, 1999 - 2002

**Business Background**

Investment Advisor Representative, Cambridge Investment  
Research Advisors, Inc.,  
February 2020 To Present

5/4/2025

## PROFESSIONAL DESIGNATIONS

Your Financial Professional has achieved the designation(s) below. If you would like additional information you may discuss with your financial professional or visit the issuing entity's website.

### AIF®—Accredited Investment Fiduciary

The AIF® Designation is administered by the Center for Fiduciary Studies, the standards-setting body of Fi360, a Broadridge® Company. The AIF® Designation certifies that the recipient has specialized knowledge of fiduciary standards of care and their application to the investment management process. To receive the AIF® Designation, the individual must: (1) meet prerequisite criteria based on a combination of education, relevant industry experience, and/or ongoing professional development, (2) complete a training program and capstone project, (3) successfully pass a comprehensive, closed-book final examination under the supervision of an approved proctor, and (4) agree to abide by the AIF® Designee Code of Ethics. In order to maintain the AIF® Designation, the individual must annually attest to being in compliance with the AIF® Designee Code of Ethics, and accrue and report a minimum of six hours of continuing education.

### CFP®—Certified Financial Planner

Individuals certified by CFP® Board have taken the step to demonstrate their professionalism by voluntarily submitting to the CFP® Certified Financial Planner certification process that includes thorough education, examination, experience and ethical requirements. The CFP® is issued by the Certified Financial Planner Board of Standards, Inc. Pre-requisites require a designee to hold a Bachelor's degree (or higher) from an accredited college or university and three years of full-time personal financial planning experience or the equivalent part-time experience. The designee is then required to complete a CFP® board registered program, or hold one of the following designations; CPA, ChFC, CLU, CFA, PH.D. in financial planning, finance, business administration, or economics, Doctor of Business Administration, Attorney's License, or CFP® certification from outside the U.S. The designee is then required to complete the CFP® certification examination. In addition, the designee is required to complete 30 hours of continuing education every two years. Certified Financial Planner Board of Standards, Inc. (CFP Board) owns the CFP® certification mark, the CERTIFIED FINANCIAL PLANNER™ certification mark, and the CFP® certification mark (with plaque design) logo in the United States, which it authorizes use of by individuals who successfully complete CFP Board's initial and ongoing certification requirements.

### ChFC®—Chartered Financial Consultant

The ChFC® Chartered Financial Consultant is issued by the American College of Financial Services. Those with the ChFC® designation have been prepared to meet the advanced financial planning needs of individuals, professionals and small business owners. The ChFC® is issued to professionals who have three years of full-time business experience within the five years preceding the awarding of the designation. The designee is then required to complete eight required courses from The American College. The required course of study includes insurance and financial planning, income taxation, planning for retirement needs, investments, and estate planning. Designees must also adhere to the American College's Code of Ethics. In addition, the designee is required to complete 30 hours of continuing education every two years through The American College.

### CPFA®—Certified Plan Fiduciary Advisor

The CPFA® Certified Plan Fiduciary Advisor, is offered by NAPA - the National Association of Plan Advisors (NAPA), demonstrates an advisor's knowledge of, and commitment to working with retirement plans as well as the expertise required to act as a plan fiduciary or help plan fiduciaries manage their roles and responsibilities. Candidates for the designation must read the NAPA CPFA/QPFC candidate handbook, pass the designation exam, and apply for a NAPA credentialed membership. In order to maintain their credential(s), CPFAs must earn 10 hours of continuing education credits every year.

## DISCIPLINARY INFORMATION

Mahesh A. Odhrani has no legal or disciplinary events to report.

## OTHER BUSINESS ACTIVITIES

In addition to serving as your investment advisory representative Mahesh A. Odhrani is engaged in the following business activities:

Arts/Performing Arts - Action Action Movie

Author/Educator/Podcast/Speaker,Consulting/Coaching - Strategic Wealth Design - Speaking Engagements

Board Member/Officer/Director/Committee Member/Board Trustee - 10420 Sub-Association

Board Member/Officer/Director/Committee Member/Board Trustee - Vegas PBS

Board Member/Officer/Director/Committee Member/Board Trustee - Vegas PBS - Planned Giving Council

Owner/Partner of a Business Entity - FinStak Solutions, LLC DBA FinStak

Owner/Partner of a Business Entity - Strategic Wealth Design, LLC DBA SWD Insurance Services

Owner/Partner of a Business Entity,Insurance/Benefits/Human Resources - Physician Disability Quotes, LLC

Owner/Partner of a Business Entity,Insurance/Benefits/Human Resources - Strategic Wealth Design, LLC DBA Strategic Wealth Design

Real Estate - N.R. Empire, LLC

There are certain business activities in which a financial professional can engage that present potential conflicts of interest. If applicable, additional disclosure relevant to your Financial Professional's outside business activities are outlined below. Please note that these are potential conflicts of interest and it is your Financial Professional's fiduciary duty to act in your best interest. If you have any questions about the disclosures please ask your Financial Professional as this is an opportunity to better understand your relationship and your Financial Professional's activities.

Your Financial Professional is independently licensed to sell insurance and annuity products through various insurance companies. When acting in this capacity, your Financial Professional will receive commissions for selling insurance and annuity products. Clients can choose any independent insurance agent and insurance company to purchase insurance products and are not obligated to purchase insurance products through your Financial Professional. Regardless of the insurance agent selected, the insurance agent or agency receives normal commissions from the sale. The receipt of compensation and other potential incentive benefits creates an incentive to recommend products to clients. At the time of any recommendations your Financial Professional will discuss the products, your needs and any compensation arrangements.

Your Financial Professional is a real estate agent and/or mortgage loan originator. In this separate capacity, your Financial Professional may earn commissions for real estate transactions or real estate loans to the extent that an advisory client may use a portion of their proceeds from the sale of their real estate to fund their securities account (s), a potential conflict of interest exists. The conflict is present in that your Financial Professional has an incentive to recommend the proceeds be placed in a securities account in which they are the registered representative or advisor on the account, thus increasing their compensation. Due to risks of investing liquefied home equity or using portions of a loan on the client's real estate, a client may not use this as a source of funds when investing with CIRA. Clients are not obligated to use the mortgage or real estate services provided by your Financial Professional.

## **ADDITIONAL COMPENSATION**

In addition to the description of other business activities outlined above, some Financial Professionals receive additional benefits from CIRA when assets are held through investment management platforms offered by CIRA, which may include CIRA's WealthPort program (also described in CIRA's Disclosure Brochure). The benefits received are in addition to the advisory fees received by your Financial Professional for serving as the investment advisor representative to the client's account. These benefits include but are not limited to increased payout on portion of their investment advisory fees, discounts on performance reporting software and participation in conferences.

Certain product sponsors provide your Financial Professional with economic benefits as a result of your Financial Professional's recommendation or sale of the product sponsors' investments. The economic benefits received can include but are not limited to, financial assistance or the sponsorship of conferences and educational sessions, marketing support, incentive awards, payment of travel expenses, and tools to assist your Financial Professional in providing various services to clients. These economic benefits may be received directly by your Financial Professional

or indirectly through CIRA and/or CIR who have entered into specific arrangements with product sponsors. These economic benefits could influence your Financial Professional to recommend certain products/programs over others. Please review the CIRA and Cambridge Revenue Sharing Disclosure located at [www.joincambridge.com](http://www.joincambridge.com) for further information. It is also available upon request.

Your Financial Professional has received a loan from CIR to assist with transitioning from a former broker/dealer to CIR. If the amount of the loan exceeds the cost of transition, your Financial Professional may use the remaining funds for other purposes, such as normal operational costs. Some loans may be forgiven based on certain criteria such as maintaining certain asset levels and tenure with the firm.

The receipt of a loan from CIR presents a conflict of interest in that your Financial Professional may have a financial incentive to maintain a relationship with CIR and recommend CIR to clients. However, to the extent that your Financial Professional recommends CIR to clients, it is because it is believed that it is in your best interest to do so based on the quality and pricing of the execution, benefits of an integrated platform for brokerage and advisory accounts, and other services provided by CIR and its affiliates.

Your Financial Professional's investment advisory activities are supervised by Donna L. Talley. Donna L. Talley monitors the recommendations provided by your Financial Professional and any transactions that are executed in your advisory accounts. Supervision is conducted through electronic reporting as well as personal communications and visits with your Financial Professional.