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**Form ADV Part 2B - Brochure Supplement**

**November 2, 2023**

**Edson L. Bridges III (“Ted”), CFA**

**Bridges Investment Management, Inc.  
13333 California Street Suite 500  
Omaha, NE 68154  
402-397-4700  
[www.bridgesinv.com](http://www.bridgesinv.com)**

This Brochure Supplement provides information about Edson L. Bridges III (“Ted”) that supplements the Bridges Investment Management Brochure. If you have not received our firm's Brochure or have any questions about the contents of this Brochure Supplement, please contact Steve Woodward at 402-397-4700 or [swoodward@bridgestrust.com](mailto:swoodward@bridgestrust.com).

Additional information about Edson L. Bridges III is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

**Item 2 - Educational Background and Business Experience**

Edson L. Bridges III (“Ted”) was born in 1958. Ted received a Bachelor of Science in Economics from Dartmouth College in 1980 and a Juris Doctorate from the University of Nebraska College of Law in 1983. Ted began his investment industry career in 1983 as an analyst for Bridges Investment Counsel, Inc. and has since held numerous titles as he progressed through the organization. Ted is CEO, Chairman, Chief Investment Officer, and a Director of Bridges Investment Management, Inc.

Ted was granted the designation Chartered Financial Analyst (CFA) in 1987. In order to earn a CFA Charter, one must have four years qualified investment work experience, become a member of CFA Institute, pledge to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct, apply for membership to a local CFA member society, and complete the CFA Program. The CFA Program is organized into three levels, each culminating in an extensive exam, and takes approximately three years to complete. Additional information about the CFA Program can be found at [www.cfainstitute.org](http://www.cfainstitute.org).

**Item 3 - Disciplinary Information**

There are no disciplinary events to disclose for Ted.

**Item 4 - Other Business Activities**

Ted is Chief Executive Officer (CEO) of Bridges Trust Company (a Nebraska chartered trust company); CEO and Director of Bridges Holding Company (a holding company with ownership of Bridges Trust Company, Bridges Trust Company of South Dakota, and Bridges Investment Management); CEO and Director of Bridges Private Equity Fund GP and Bridges Private Equity Fund I LP; and Ted is involved with several charitable and professional organizations including but not limited to serving on the boards of the Gretchen Swanson Center for Nutrition charitable organization as well as College of Saint Mary where Ted chairs their Investment Committee.

**Item 5 - Additional Compensation**

Ted does not receive additional economic benefits from any third party for the provision of advisory services.

**Item 6 - Supervision**

The Investment Committee serves as the first line of supervision for the firm’s investment professionals. The Committee meets at least monthly to set and maintain a list of approved and recommended securities for use across the firm. Portfolio Managers are not restricted to owning names that have been approved by the Committee; however, many holdings in a given client’s portfolio will generally come from the approved list.

Supervision of individual investment professionals begins with a review of asset allocations compared to stated client objectives. Performance is reviewed relative to a representative selection of similarly situated client accounts. If a reviewed portfolio has an asset allocation or a performance result that falls outside of the tolerance levels, a full portfolio review will be performed by the Committee.

If the Committee finds that the Portfolio Manager is acting in a manner that is inconsistent with a client’s stated objectives, they will be instructed to reposition the portfolio so that it complies with the portfolio’s investment policy statement.

Edson L. Bridges III (“Ted”) is the head of the Investment Committee and is primarily responsible for the supervision of all supervised individuals. Ted is the CEO of Bridges Investment Management, Inc. and can be reached at 402-397-4700.

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**Form ADV Part 2B - Brochure Supplement**

**February 29, 2023**

**Nicholas Wilwerding, CFA, CAP®**

**Bridges Investment Management, Inc.  
13333 California Street Suite 500  
Omaha, NE 68154  
402-397-4700  
[www.bridgesinv.com](http://www.bridgesinv.com)**

This Brochure Supplement provides information about Nicholas Alan Wilwerding that supplements the Bridges Investment Management Brochure. If you have not received our firm's Brochure or have any questions about the contents of this Brochure Supplement, please contact Steve Woodward at 402-397-4700 or [swoodward@bridgestrust.com](mailto:swoodward@bridgestrust.com).

Additional information about Nicholas Wilwerding is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## **Item 2 - Educational Background and Business Experience**

Nicholas Wilwerding (“Nick”) was born in 1982. Nick received his Bachelor of Science in Business Administration from Creighton University in Omaha, Nebraska. Nick was promoted to President and Chief Operating Officer in February 2022, Treasurer in January 2024, and has served in executive roles of progressing responsibility since joining Bridges Investment Management, Inc. (“BIM”) in January 2018. Prior to joining BIM, Nick served as President, Western Region, of Westwood Trust from March 2017 to January 2018. Nick held numerous titles with Westwood as he progressed through the organization starting in November 2010, when Westwood Advisors (formerly known as McCarthy Group Advisors, L.L.C.) was acquired by Westwood Holdings Group, Inc. Nick began his investment industry career in 2006 as an analyst for McCarthy Group Advisors, LLC. Nick also served as a structured securities intern with Mutual of Omaha from May 2004 to January 2006.

Nick was granted the designation Chartered Financial Analyst (CFA) in 2009. In order to earn a CFA Charter, one must have four years qualified investment work experience, become a member of CFA Institute, pledge to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct on an annual basis, apply for membership to a local CFA member society, and complete the CFA Program. The CFA Program is organized into three levels, each culminating in an extensive exam, and takes approximately three years to complete. Additional information about the CFA designation can be found at [www.cfainstitute.org](http://www.cfainstitute.org).

Nick is a Chartered Advisor in Philanthropy (CAP®). The CAP program requires a minimum of 3 years’ experience advising individuals or charitable organizations in wealth and estate planning, financial planning, charitable planning, charitable giving, planned giving, nonprofit or foundation management services, investment management of charitable assets or accounting; completion of three graduate level courses; and successful completion of three exams. Additional information about the CAP® designation can be found at [www.theamericancollege.edu/designations-degrees/CAP](http://www.theamericancollege.edu/designations-degrees/CAP).

## **Item 3 - Disciplinary Information**

There are no disciplinary events to disclose for Nick.

## **Item 4 - Other Business Activities**

Nick is President, Chief Operating Officer, Treasurer, and a Director of Bridges Trust Company (a Nebraska chartered trust company), Bridges Private Equity Fund GP, Bridges Private Equity Fund I LP, and President, Chief Operating Officer, and a Director of Bridges Trust Company of South Dakota (a South Dakota chartered trust company). Nick also volunteers as an Investment Committee member of the Creighton University Endowment, a Board Director at Madonna Rehabilitation Hospital, and a member of the Marian High School Board of Trustees. Nick is not actively engaged in any other business or occupation deemed substantial.

## **Item 5 - Additional Compensation**

Nick does not receive additional economic benefit from any third party for the provision of advisory services.

## **Item 6 - Supervision**

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Edson L. Bridges III (“Ted”) is the head of the Investment Committee and is primarily responsible for the supervision of all supervised individuals. Ted is the CEO of Bridges Investment Management, Inc. and can be reached at 402-397-4700.

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**November 2, 2023**

**Michael G. App, CAP®**

**Bridges Investment Management, Inc.  
13333 California Street Suite 500  
Omaha, NE 68154  
402-397-4700  
[www.bridgesinv.com](http://www.bridgesinv.com)**

This Brochure Supplement provides information about Michael G. App that supplements the Bridges Investment Management Brochure. If you have not received our firm's Brochure or have any questions about the contents of this Brochure Supplement, please contact Steve Woodward at 402-397-4700 or [swoodward@bridgestrust.com](mailto:swoodward@bridgestrust.com).

Additional information about Michael G. App is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## **Item 2 - Educational Background and Business Experience**

Michael G. App (“Mike”) was born in 1966. Mike received his Bachelor of Science in Business Administration with an emphasis in Finance from Creighton University. Mike is a Senior Vice President and serves as a member of Bridges Investment Management’s Board of Directors. Mike also oversees the Alternative Investments Team and serves as a member of the Investment Committee. Mike led the Family Office Service team of Bridges Trust Company from 2017 to 2020 and the Philanthropy Services team of Bridges Trust Company from 2017 to 2021. Prior to joining BIM, Mike held numerous roles with increasing responsibility as summarized below.

- The FireTaft Group - self-employed consultant to family offices with interests in farmland management, construction and private equity (2016-2017)
- West Partners - Partner at a family office private equity firm (2015-2016)
- Lozier Enterprises - Chief Investment Officer for a family office with interests in manufacturing, banking, real estate, investment management, and philanthropy (2004-2015)
- McCarthy Group Advisors - Fixed income portfolio management, multimanager investment management, securities operations management, and client service (1996-2004)
- First National Bank of Omaha - fixed income trading and portfolio management (1988-1996)

Mike is a Chartered Advisor in Philanthropy (CAP®). The CAP program requires a minimum of 3 years’ experience advising individuals or charitable organizations in wealth and estate planning, financial planning, charitable planning, charitable giving, planned giving, nonprofit or foundation management services, investment management of charitable assets or accounting; completion of three graduate level courses; and successful completion of three exams. Additional information about the CAP® designation can be found at [www.theamericancollege.edu/designations-degrees/CAP](http://www.theamericancollege.edu/designations-degrees/CAP).

## **Item 3 - Disciplinary Information**

There are no disciplinary events to disclose for Mike.

## **Item 4 - Other Business Activities**

Mike is Director and Senior Vice President of Bridges Trust Company (a Nebraska chartered trust company), Bridges Trust Company of South Dakota (a South Dakota chartered trust company), Bridges Private Equity Fund GP, and Bridges Private Equity Fund I LP. Mike is also a Director at American National Bank, Advisory Board Member to Hawkins Construction, Vice President of BAMSE LLC, (a marketing and special events company), Investor in Reizol LLC (a private investment company), President of FireTaft LLC (a management consulting company with investments in private equity), Vice President, Treasurer, and Investor in Troupe LLC (a music festival company), and Officer of Bridges Holding Company (Holding Company of Bridges Investment Management, Bridges Trust Company and Bridges Trust Company of South Dakota). Mike volunteers as an investment committee member to Creighton Preparatory School and Finance Committee member to St. Pius X/St. Leo School.

## **Item 5 - Additional Compensation**

Mike receives compensation for his participation on the boards of American National Bank, Hawkins Construction Company and Fire Taft LLC. Mike does not receive additional economic benefit from other third parties for the provision of advisory services and is not actively engaged in any other business or occupation deemed substantial.

## **Item 6 - Supervision**

The Investment Committee serves as the first line of supervision for the firm’s investment professionals. The Committee meets at least monthly to set and maintain a list of approved and recommended securities for use across the firm. Portfolio Managers are not restricted to owning names that have been approved by the Committee; however, many holdings in a given client’s portfolio will generally come from the approved list.

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If the Committee finds that the Portfolio Manager is acting in a manner that is inconsistent with a client’s stated objectives, they will be instructed to reposition the portfolio so that it complies with the portfolio’s investment policy statement.

Edson L. Bridges III (“Ted”) is the head of the Investment Committee and is primarily responsible for the supervision of all supervised individuals. Ted is the CEO of Bridges Investment Management, Inc. and can be reached at 402-397-4700.

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**January 6, 2023**

**Brian M. Kirkpatrick, CFA**

**Bridges Investment Management, Inc.  
13333 California Street Suite 500  
Omaha, NE 68154  
402-397-4700  
[www.bridgesinv.com](http://www.bridgesinv.com)**

This Brochure Supplement provides information about Brian M. Kirkpatrick that supplements the Bridges Investment Management Brochure. If you have not received our firm's Brochure or have any questions about the contents of this Brochure Supplement, please contact Steve Woodward at 402-397-4700 or [swoodward@bridgestrust.com](mailto:swoodward@bridgestrust.com).

Additional information about Brian M. Kirkpatrick is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

**Item 2 - Educational Background and Business Experience**

Brian M. Kirkpatrick was born in 1971 and received a Bachelor of Science in Business Administration from Pensacola Christian College in 1992. Brian began his investment industry career in 1992 as an accounting trainee for Bridges Investment Counsel, Inc. and has held numerous titles as he progressed through the organization. Currently, Brian serves as Senior Vice President of Bridges Investment Management, Inc. (“BIM”). He is also a Director of BIM and is a member of the Investment Committee.

Brian was granted the designation Chartered Financial Analyst (CFA) in 2001. In order to earn a CFA Charter, one must have four years qualified investment work experience, become a member of CFA Institute, pledge to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct on an annual basis, apply for membership to a local CFA member society, and complete the CFA Program. The CFA Program is organized into three levels, each culminating in an extensive exam, and takes approximately three years to complete. Additional information about the CFA designation can be found at [www.cfainstitute.org](http://www.cfainstitute.org).

**Item 3 - Disciplinary Information**

There are no disciplinary events to disclose for Brian.

**Item 4 - Other Business Activities**

Brian serves as a Senior Vice President of Bridges Trust Company (a Nebraska chartered trust company) and Bridges Trust Company of South Dakota. Brian is not actively engaged in any other business or occupation deemed substantial.

**Item 5 - Additional Compensation**

Brian does not receive additional economic benefit from any third party for the provision of advisory services.

**Item 6 - Supervision**

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**March 13, 2024**

**Douglas R. Plahn, CFA**

**Bridges Investment Management, Inc.  
13333 California Street Suite 500  
Omaha, NE 68154  
402-397-4700  
[www.bridgesinv.com](http://www.bridgesinv.com)**

This Brochure Supplement provides information about Douglas R. Plahn that supplements the Bridges Investment Management Brochure. If you have not received our firm's Brochure or have any questions about the contents of this Brochure Supplement, please contact Steve Woodward at 402-397-4700 or [swoodward@bridgestrust.com](mailto:swoodward@bridgestrust.com).

Additional information about Douglas R. Plahn is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

**Item 2 - Educational Background and Business Experience**

Douglas R. Plahn (“Doug”) was born in 1970. Doug received a Bachelor of Science in Accounting from the University of Nebraska - Lincoln in 1993. Doug began his investment industry career in 1993 and has held numerous titles as he progressed through the organization. Doug is currently a Senior Vice President of Bridges Investment Management, Inc. (“BIM”). He is also a Director of BIM and a member of the Investment Committee.

Doug was granted the designation Chartered Financial Analyst (CFA) in 2000. In order to earn a CFA Charter, one must have four years qualified investment work experience, become a member of CFA Institute, pledge to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct on an annual basis, apply for membership to a local CFA member society, and complete the CFA Program. The CFA Program is organized into three levels, each culminating in an extensive exam, and takes approximately three years to complete. Additional information about the CFA designation can be found at [www.cfainstitute.org](http://www.cfainstitute.org).

**Item 3 - Disciplinary Information**

There are no disciplinary events to disclose for Doug.

**Item 4 - Other Business Activities**

Doug is a Senior Vice President, Director, and Chairman of Bridges Trust Company (a Nebraska chartered trust company) and Senior Vice President, Treasurer, Director, and Chairman of Bridges Trust Company of South Dakota (a South Dakota chartered Trust Company). Doug is not actively engaged in any other business or occupation deemed substantial.

**Item 5 - Additional Compensation**

Doug does not receive additional economic benefit from any third party for the provision of advisory services.

**Item 6 - Supervision**

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**Form ADV Part 2B - Brochure Supplement**

**March 5, 2024**

**Megan M. McMurry, CPA, CFP®, CAP®**

**Bridges Investment Management, Inc.  
13333 California Street Suite 500  
Omaha, NE 68154  
402-397-4700  
[www.bridgesinv.com](http://www.bridgesinv.com)**

This Brochure Supplement provides information about Megan M. McMurry that supplements the Bridges Investment Management Brochure. If you have not received our firm's Brochure or have any questions about the contents of this Brochure Supplement, please contact Steve Woodward at 402-397-4700 or [swoodward@bridgestrust.com](mailto:swoodward@bridgestrust.com).

Additional information about Megan M. McMurry is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

**Item 2 - Educational Background and Business Experience**

Megan M. McMurry was born in 1982. Megan received her Bachelor of Business Administration and Bachelor of Accounting from Concordia University. Megan also received her Master of Accountancy from the University of New Orleans. Megan progressed through the organization with roles of increasing responsibility since joining Bridges Investment Management, Inc. ("BIM") in September 2017 and is currently the Executive Vice President of Relationship Management as well as a member of the Investment Committee. Prior to joining BIM, Megan served as a Financial Advisor/Wealth Planning Analyst at UBS Financial Services in Omaha from August 2014 to August of 2017 and as a Manager/Staff Accountant with Dana F. Cole & Co. LLP from January 2006 to August 2014.

Megan is a Certified Financial Planner (CFP®). The CFP Program requires completion of financial planning coursework through a CFP Board Registered Program, a bachelor's degree or higher, CFP exam completion, either 6,000 hours professional experience or 4,000 hours apprenticeship experience under a CFP professional's supervision covering the financial planning process, and commitment to high ethical and conduct standards. Additional information about the CFP® designation can be found at [www.cfp.net](http://www.cfp.net).

Megan is a Chartered Advisor in Philanthropy (CAP®). The CAP program requires a minimum of 3 years' experience advising individuals or charitable organizations in wealth and estate planning, financial planning, charitable planning, charitable giving, planned giving, nonprofit or foundation management services, investment management of charitable assets or accounting; completion of three graduate level courses; and successful completion of three exams. Additional information about the CAP® designation can be found at [www.theamericancollege.edu/designations-degrees/CAP](http://www.theamericancollege.edu/designations-degrees/CAP).

Megan earned her Certified Public Accountant (CPA) license in October of 2008. The CPA Program in Nebraska requires completion of the 150-semester hour educational requirement, 16-hour test comprised of four sections, professional ethics examination, work experience requirement, and membership in a local board of accountancy.

Megan completed level I out of three levels of the Chartered Financial Analyst Institute's CFA curriculum program and is a member of the CFA Society of Nebraska. The CFA Program is organized into three levels, each culminating in an extensive exam, and takes approximately three years to complete. Additional information about the CFA designation can be found at [www.cfainstitute.org](http://www.cfainstitute.org).

**Item 3 - Disciplinary Information**

There are no disciplinary events to disclose for Megan.

**Item 4 - Other Business Activities**

Megan is an Executive Vice President of Bridges Trust Company (a Nebraska chartered trust company). Megan is a Board Member of the Salvation Army (Western Division) and the board's Finance Committee. Megan is also a Board Member of The Kim Foundation and maintains memberships with the American Institute of Certified Public Accounts (AICPA), Nebraska Society of Certified Public Accountants, Omaha Estate Planning Council, Financial Planning Association of Nebraska, and Accounting and Financial Women's Alliance. Megan does not provide tax advice and is not actively engaged in any other business or occupation deemed substantial.

**Item 5 - Additional Compensation**

Megan does not receive additional economic benefit from any third party for the provision of advisory services.

**Item 6 - Supervision**

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**Form ADV Part 2B - Brochure Supplement**

**March 13, 2024**

**Jack Holmes, CFA, CAP®**

**Bridges Investment Management, Inc.  
13333 California Street Suite 500  
Omaha, NE 68154  
402-397-4700  
[www.bridgesinv.com](http://www.bridgesinv.com)**

This Brochure Supplement provides information about Jack Holmes that supplements the Bridges Investment Management Brochure. If you have not received our firm's Brochure or have any questions about the contents of this Brochure Supplement, please contact Steve Woodward at 402-397-4700 or [swoodward@bridgestrust.com](mailto:swoodward@bridgestrust.com).

Additional information about Jack Holmes is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

**Item 2 - Educational Background and Business Experience**

Jack J. Holmes was born in 1983. Jack graduated from Colorado State University's College of Business with a Bachelor of Science in Business Administration specializing in Finance in 2005. Jack also received a Master of Security Analysis & Portfolio Management from Creighton University's Heider College of Business in 2011. Jack worked at TD Ameritrade from 2007 through 2011 as a member of the retirement account services and internal audit teams. From 2011 through 2014 he served as Investment Analyst and an Investment Officer for First Nebraska Trust Company, based out of Lincoln, Nebraska. In 2015, Jack joined WealthPLAN Partners in Omaha, Nebraska, where he served as the firm's Chief Investment Officer for over six years. Amongst various duties, he was responsible for security analysis, portfolio management and strategy development for the firm of 30+ advisors and their clients. Jack joined Bridges Investment Management in April 2021, serving as Senior Vice President and as a member of the firm's Investment Committee.

Jack was granted the designation Chartered Financial Analyst (CFA) in 2012. In order to earn a CFA Charter, one must have four years qualified investment work experience, become a member of CFA Institute, pledge to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct on an annual basis, apply for membership to a local CFA member society, and complete the CFA Program. The CFA Program is organized into three levels, each culminating in an extensive exam, and takes approximately three years to complete. Additional information about the CFA designation can be found at [www.cfainstitute.org](http://www.cfainstitute.org).

Jack also earned the Chartered Advisor in Philanthropy (CAP<sup>®</sup>) designation in 2024. The CAP program requires a minimum of 3 years' experience advising individuals or charitable organizations in wealth and estate planning, financial planning, charitable planning, charitable giving, planned giving, nonprofit or foundation management services, investment management of charitable assets or accounting; completion of three graduate level courses; and successful completion of three exams. Additional information about the CAP<sup>®</sup> designation can be found at [www.theamericancollege.edu/designations-degrees/CAP](http://www.theamericancollege.edu/designations-degrees/CAP).

**Item 3 - Disciplinary Information**

There are no disciplinary events to disclose for Jack.

**Item 4 - Other Business Activities**

Jack is a Senior Vice President Officer of Bridges Trust Company (a Nebraska chartered trust company). Jack is not actively engaged in any other business or occupation deemed substantial.

**Item 5 - Additional Compensation**

Jack does not receive additional economic benefit from any third party for the provision of advisory services.

**Item 6 - Supervision**

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Form ADV Part 2B - Brochure Supplement

March 13, 2024

Brett R. Lindstrom, CAP®

Bridges Investment Management, Inc.  
13333 California Street Suite 500  
Omaha, NE 68154  
402-397-4700  
[www.bridgesinv.com](http://www.bridgesinv.com)

This Brochure Supplement provides information about Brett R. Lindstrom that supplements the Bridges Investment Management Brochure. If you have not received our firm's Brochure or have any questions about the contents of this Brochure Supplement, please contact Steve Woodward at 402-397-4700 or [swoodward@bridgestrust.com](mailto:swoodward@bridgestrust.com).

Additional information about Brett R. Lindstrom is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

**Item 2 - Educational Background and Business Experience**

Brett R. Lindstrom was born in 1981. Brett received a Bachelor of Science in History from the University of Nebraska - Lincoln in 2004. Brett began his wealth management career in 2004 as a Senior Wealth Strategy Associate for The Lindstrom Group under the Morgan Stanley Smith Barney umbrella from 2004 - 2010 and under the UBS umbrella from 2010 - 2022. Brett is a Senior Vice President, Relationship Manager at Bridges Investment Management, Inc.

In addition to his career in wealth management, Brett served as a Nebraska State Senator from 2014 to 2022. During that time Brett served as Chairman and Vice Chairman of Banking, Commerce and Insurance Committee, Chairman of Tribal Relations Committee, Vice Chair of Revenue Committee, Vice Chair of Retirement Systems Committee and has served on several economic development subcommittees.

Brett completed the FINRA Series 65 Uniform Investment Advisor exam in 2005 and he earned the Chartered Advisor in Philanthropy (CAP®) designation in 2024. The CAP program requires a minimum of 3 years' experience advising individuals or charitable organizations in wealth and estate planning, financial planning, charitable planning, charitable giving, planned giving, nonprofit or foundation management services, investment management of charitable assets or accounting; completion of three graduate level courses; and successful completion of three exams. Additional information about the CAP® designation can be found at [www.theamericancollege.edu/designations-degrees/CAP](http://www.theamericancollege.edu/designations-degrees/CAP).

**Item 3 - Disciplinary Information**

There are no disciplinary events to disclose for Brett.

**Item 4 - Other Business Activities**

Brett is a Senior Vice President of Bridges Trust Company (a Nebraska chartered trust company). Brett also serves as a member of the Nebraska State Fair Board, President of Trusting in Nebraska, Inc., as well as a volunteer to multiple non-profit organizations. Brett is not actively engaged in any other business or occupation deemed substantial.

**Item 5 - Additional Compensation**

Brett does not receive additional economic benefit from any third party for the provision of advisory services.

**Item 6 - Supervision**

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Supervision of individual investment professionals begins with a review of asset allocations compared to stated client objectives. Performance is reviewed relative to a representative selection of similarly situated client accounts. If a reviewed portfolio has an asset allocation or a performance result that falls outside of the tolerance levels, a full portfolio review will be performed by the Committee.

If the Committee finds that the Portfolio Manager is acting in a manner that is inconsistent with a client's stated objectives, they will be instructed to reposition the portfolio so that it complies with the portfolio's investment policy statement.

Edson L. Bridges III ("Ted") is the head of the Investment Committee and is primarily responsible for the supervision of all supervised individuals. Ted is the CEO of Bridges Investment Management, Inc. and can be reached at 402-397-4700.



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**Form ADV Part 2B - Brochure Supplement**

**August 21, 2023**

**Sarah F. Murray, CFA, CIPM**

**Bridges Investment Management, Inc.  
13333 California Street Suite 500  
Omaha, NE 68154  
402-397-4700  
[www.bridgesinv.com](http://www.bridgesinv.com)**

This Brochure Supplement provides information about Sarah F. Murray that supplements the Bridges Investment Management Brochure. If you have not received our firm's Brochure or have any questions about the contents of this Brochure Supplement, please contact Steve Woodward at 402-397-4700 or [swoodward@bridgestrust.com](mailto:swoodward@bridgestrust.com).

Additional information about Sarah F. Murray is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

**Item 2 - Educational Background and Business Experience**

Sarah F. Murray was born in 1986. Sarah received her Bachelor of Business Administration from the University of Missouri at Kansas City in 2008. Sarah also received her Master of Security Analysis and Portfolio Management as well as her Master of Business Administration from Creighton University in 2010. Sarah has served as a Vice President of Bridges Investment Management, Inc. (“BIM”) and as a member of the Investment Committee since January 2018. Prior to that, she served as Vice President, Western Region, of Westwood Trust from June 2017 to January 2018. Sarah served as an Associate Vice President with Westwood from July 2015 to June 2017. Prior to joining Westwood Sarah served as a Market Risk Analyst and Senior Market Risk Analyst for Gavilon Group, LLC from March 2010 to Jun 2015. Sarah also served as an Investment Intern with McCarthy Group Advisors, L.L.C. (which was acquired by Westwood Holdings Group, Inc. in 2010) from April 2009 to May 2010.

Sarah was granted the designation Chartered Financial Analyst (CFA) in 2017. In order to earn a CFA Charter, one must have four years qualified investment work experience, become a member of CFA Institute, pledge to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct on an annual basis, apply for membership to a local CFA member society, and complete the CFA Program. The CFA Program is organized into three levels, each culminating in an extensive exam, and takes approximately three years to complete. Additional information about the CFA designation can be found at [www.cfainstitute.org](http://www.cfainstitute.org).

Sarah earned a Certificate in Investment Performance Measurement™ designation (CIPM®) in 2021. The CIPM program is a specialized course of study offered by the CFA Institute that leads to the CIPM certificate and is dedicated to investment performance evaluation and presentation. The program promotes professional ethics, global best practices in investment performance measurement, attribution, appraisal, and reporting techniques as well as proficiency using the increasingly important Global Investment Performance Standards (GIPS)®. To earn the CIPM certificate, candidates must qualify for or pass two exams and have two years of professional experience substantially entailing performance related activities or four years in the investment industry. Additional information about the CIPM designation can be found at [www.cfainstitute.org/programs/cipm](http://www.cfainstitute.org/programs/cipm).

**Item 3 - Disciplinary Information**

There are no disciplinary events to disclose for Sarah.

**Item 4 - Other Business Activities**

Sarah is a Vice President of Bridges Trust Company (a Nebraska chartered trust company), Director at Large and Treasurer to the CFA Society of Nebraska Board of Directors, Adjunct Professor at Creighton University, and is not actively engaged in any other business or occupation deemed substantial.

**Item 5 - Additional Compensation**

Sarah does not receive additional economic benefit from any third party for the provision of advisory services.

**Item 6 - Supervision**

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**Form ADV Part 2B - Brochure Supplement**

**January 6, 2023**

**Nancy K. Dodge, CTFA**

**Bridges Investment Management, Inc.  
13333 California Street Suite 500  
Omaha, NE 68154  
402-397-4700  
[www.bridgesinv.com](http://www.bridgesinv.com)**

This Brochure Supplement provides information about Nancy K. Dodge that supplements the Bridges Investment Management Brochure. If you have not received our firm's Brochure or have any questions about the contents of this Brochure Supplement, please contact Steve Woodward at 402-397-4700 or [swoodward@bridgestrust.com](mailto:swoodward@bridgestrust.com).

Additional information about Nancy K. Dodge is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

**Item 2 - Educational Background and Business Experience**

Nancy K. Dodge was born in 1961 and attended Lincoln School of Commerce. Nancy began her investment industry career in 1980 as Assistant to the President for Bridges Investment Counsel, Inc. and has held numerous titles as she progressed through the organization. Nancy currently serves as a Vice President of Bridges Investment Management, Inc.

Nancy received the Certified Trust and Financial Advisor designation in 2006. In order to earn the CTFA designation, one must have a minimum of three years' experience in the wealth management field and successfully complete a wealth management training program approved by the American Bankers Association Institute of Certified Bankers. Additional information about the CTFA designation can be found at [www.investopedia.com/terms/c/certified-trust-and-financial-advisor.asp](http://www.investopedia.com/terms/c/certified-trust-and-financial-advisor.asp).

**Item 3 - Disciplinary Information**

There are no disciplinary events to disclose for Nancy.

**Item 4 - Other Business Activities**

Nancy serves as a Vice President of Bridges Trust Company (a Nebraska chartered trust company) and Bridges Trust Company of South Dakota. Nancy is not actively engaged in any other business or occupation deemed substantial.

**Item 5 - Additional Compensation**

Nancy does not receive additional economic benefit from any third party for the provision of advisory services.

**Item 6 - Supervision**

The Investment Committee serves as the first line of supervision for the firm's investment professionals. The Committee meets at least monthly to set and maintain a list of approved and recommended securities for use across the firm. Portfolio Managers are not restricted to owning names that have been approved by the Committee; however, many holdings in a given client's portfolio will generally come from the approved list.

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If the Committee finds that the Portfolio Manager is acting in a manner that is inconsistent with a client's stated objectives, they will be instructed to reposition the portfolio so that it complies with the portfolio's investment policy statement.

Edson L. Bridges III ("Ted") is the head of the Investment Committee and is primarily responsible for the supervision of all supervised individuals. Ted is the CEO of Bridges Investment Management, Inc. and can be reached at 402-397-4700.

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**Form ADV Part 2B - Brochure Supplement**

**August 28, 2023**

**Deborah L. Grant**

**Bridges Investment Management, Inc.  
13333 California Street Suite 500  
Omaha, NE 68154  
402-397-4700  
[www.bridgesinv.com](http://www.bridgesinv.com)**

This Brochure Supplement provides information about Deborah L. Grant that supplements the Bridges Investment Management Brochure. If you have not received our firm's Brochure or have any questions about the contents of this Brochure Supplement, please contact Steve Woodward at 402-397-4700 or [swoodward@bridgestrust.com](mailto:swoodward@bridgestrust.com).

Additional information about Deborah L. Grant is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

**Item 2 - Educational Background and Business Experience**

Deborah L. Grant (“Deb”) was born in 1958 and graduated in 1976 from Burke High School in Omaha, Nebraska. Deb began her investment industry career in 1975 as an Accountant/Statistician for Bridges Investment Counsel, Inc. and has held numerous positions as she progressed through the organization. Deb currently serves as a Vice President of Bridges Investment Management, Inc.

**Item 3 - Disciplinary Information**

There are no disciplinary events to disclose for Deb.

**Item 4 - Other Business Activities**

Deb is a Vice President of Bridges Trust Company (a Nebraska chartered trust company) and is not actively engaged in any other business or occupation deemed substantial.

**Item 5 - Additional Compensation**

Deb does not receive additional economic benefit from any third party for the provision of advisory services.

**Item 6 - Supervision**

The Investment Committee serves as the first line of supervision for the firm’s investment professionals. The Committee meets at least monthly to set and maintain a list of approved and recommended securities for use across the firm. Portfolio Managers are not restricted to owning names that have been approved by the Committee; however, many holdings in a given client’s portfolio will generally come from the approved list.

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**Form ADV Part 2B - Brochure Supplement**

**September 29, 2022**

**Daniel D. Walker, CFA**

**Bridges Investment Management, Inc.  
13333 California Street Suite 500  
Omaha, NE 68154  
402-397-4700  
[www.bridgesinv.com](http://www.bridgesinv.com)**

This Brochure Supplement provides information about Daniel David Walker that supplements the Bridges Investment Management Brochure. If you have not received our firm's Brochure or have any questions about the contents of this Brochure Supplement, please contact Steve Woodward at 402-397-4700 or [swoodward@bridgestrust.com](mailto:swoodward@bridgestrust.com).

Additional information about Daniel David Walker is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

**Item 2 - Educational Background and Business Experience**

Daniel David Walker (“Dan”) was born in 1978. Dan received a Bachelor of Fine Arts in Creative Writing from the University of Evansville and a Master of Business Administration in Applied Securities Analysis from the University of Wisconsin-Madison. Dan began his investment industry career in 2011 as a Research Analyst for Heartland Advisors and subsequently transitioned to a similar role with Weitz Investment Management in 2015. Dan joined Bridges Investment Management Inc. in 2019 as a Senior Research Analyst and was promoted to Research Director in August 2022. He is also a member of the Investment Committee.

Dan was granted the designation Chartered Financial Analyst (CFA) in 2014. In order to earn a CFA Charter, one must have four years qualified investment work experience, become a member of CFA Institute, pledge to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct on an annual basis, apply for membership to a local CFA member society, and complete the CFA Program. The CFA Program is organized into three levels, each culminating in an extensive exam, and takes approximately three years to complete. Additional information about the CFA designation can be found at [www.cfainstitute.org](http://www.cfainstitute.org).

**Item 3 - Disciplinary Information**

There are no disciplinary events to disclose for Dan.

**Item 4 - Other Business Activities**

Dan is an Officer of Bridges Trust Company (a Nebraska chartered trust company) and volunteers as a Board Director as well as Finance Committee member for RISE, a non-profit organization focused on job re-entry and readiness training. Dan is not actively engaged in any other business or occupation deemed substantial.

**Item 5 - Additional Compensation**

Dan does not receive additional economic benefit from any third party for the provision of advisory services.

**Item 6 - Supervision**

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Edson L. Bridges III (“Ted”) is the head of the Investment Committee and is primarily responsible for the supervision of all supervised individuals. Ted is the CEO of Bridges Investment Management, Inc. Ted can be reached at 402-397-4700.



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**Form ADV Part 2B - Brochure Supplement**

**March 5, 2024**

**Brenda Anderson**

**Bridges Investment Management, Inc.  
13333 California Street Suite 500  
Omaha, NE 68154  
402-397-4700  
[www.bridgesinv.com](http://www.bridgesinv.com)**

This Brochure Supplement provides information about Brenda Anderson that supplements the Bridges Investment Management Brochure. If you have not received our firm's Brochure or have any questions about the contents of this Brochure Supplement, please contact Steve Woodward at 402-397-4700 or [swoodward@bridgestrust.com](mailto:swoodward@bridgestrust.com).

Additional information about Brenda Anderson is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## **Item 2 - Educational Background and Business Experience**

Brenda Anderson was born in 1969. Brenda attained her Associate Degree of Applied Sciences with an emphasis in Business Management from Des Moines Area Community College. Brenda began her investment industry career in 1999 with TD Ameritrade where she worked in various roles with increasing responsibility and transitioned to Securities America in 2014 where she worked as an IRA Distributions and Asset Transfer Processing Manager. Brenda joined Bridges Investment Management in 2020 where she works as a Client Service Manager.

Brenda completed the FINRA Series 66 - Uniform Combined State Law exam in November 2004. She has been registered as an Investment Adviser Representative with Bridges Investment Management since August 2020.

## **Item 3 - Disciplinary Information**

There are no disciplinary events to disclose for Brenda.

## **Item 4 - Other Business Activities**

Brenda is an officer of Bridges Trust Company (a Nebraska chartered trust company) and is not actively engaged in any other business or occupation deemed substantial.

## **Item 5 - Additional Compensation**

Brenda does not receive additional economic benefit from any third party for the provision of advisory services.

## **Item 6 - Supervision**

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**Form ADV Part 2B - Brochure Supplement**

**July 6, 2022**

**Matt Eglseder, CFP®**

**Bridges Investment Management, Inc.  
13333 California Street Suite 500  
Omaha, NE 68154  
402-397-4700  
[www.bridgesinv.com](http://www.bridgesinv.com)**

This Brochure Supplement provides information about Matt Eglseder that supplements the Bridges Investment Management Brochure. If you have not received our firm's Brochure or have any questions about the contents of this Brochure Supplement, please contact Steve Woodward at 402-397-4700 or [swoodward@bridgestrust.com](mailto:swoodward@bridgestrust.com).

Additional information about Matt Eglseder is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

**Item 2 - Educational Background and Business Experience**

Matt Eglseder was born in 1994. Matt graduated from Creighton University with a Bachelor of Science in Business Administration with concentrations in Financial Analysis and Financial Planning. Matt began his investment industry career with TD Ameritrade in 2017 where he served as a Financial Services Representative and New Client Specialist. Matt subsequently transitioned his career to RBC Capital Markets in late 2018 as a Financial Advisor until joining Bridges Investment Management as a Portfolio Analyst in early 2020 where he participates in the firm's Investment Committee and his primary responsibilities include Financial Planning and Investment Management.

Matt is a Certified Financial Planner (CFP®). The CFP Program requires completion of financial planning coursework through a CFP Board Registered Program, a bachelor's degree or higher, CFP exam completion, either 6,000 hours professional experience or 4,000 hours apprenticeship experience under a CFP professional's supervision covering the financial planning process, and commitment to high ethical and conduct standards. Additional information about the CFP designation can be found at [www.cfp.net](http://www.cfp.net).

**Item 3 - Disciplinary Information**

There are no disciplinary events to disclose for Matt.

**Item 4 - Other Business Activities**

Matt is an Officer of Bridges Trust Company (a Nebraska chartered trust company) and also serves as a Director on the Financial Planning Association of Nebraska Board of Directors. Matt is not actively engaged in any other business or occupation deemed substantial.

**Item 5 - Additional Compensation**

Matt does not receive additional economic benefit from any third party for the provision of advisory services.

**Item 6 - Supervision**

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**Form ADV Part 2B - Brochure Supplement**

**December 16, 2022**

**Sarah M. Robak, CFA, CFP®**

**Bridges Investment Management, Inc.  
13333 California Street Suite 500  
Omaha, NE 68154  
402-397-4700  
[www.bridgesinv.com](http://www.bridgesinv.com)**

This Brochure Supplement provides information about Sarah M. Robak that supplements the Bridges Investment Management Brochure. If you have not received our firm's Brochure or have any questions about the contents of this Brochure Supplement, please contact Steve Woodward at 402-397-4700 or [swoodward@bridgestrust.com](mailto:swoodward@bridgestrust.com).

Additional information about Sarah M. Robak is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

**Item 2 - Educational Background and Business Experience**

Sarah Robak was born in 1981. Sarah graduated from the University of Nebraska at Omaha with a Bachelor of Arts in Finance and Banking in 2003 and graduated from the University of Nebraska at Omaha with a Master of Business Administration in 2006. She began her investment industry career at TD Ameritrade in 2006, where she held various analytical roles in Finance, Marketing, and Product Strategy.

Sarah was granted the designation Chartered Financial Analyst (CFA) in 2010. In order to earn a CFA Charter, one must have four years qualified investment work experience, become a member of CFA Institute, pledge to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct, apply for membership to a local CFA member society, and complete the CFA Program. The CFA Program is organized into three levels, each culminating in an extensive exam, and takes approximately three years to complete. Additional information about the CFA Program can be found at [www.cfainstitute.org](http://www.cfainstitute.org).

Sarah is also a Certified Financial Planner (CFP®). The CFP Program requires completion of financial planning coursework through a CFP Board Registered Program, a bachelor's degree or higher, CFP exam completion, either 6,000 hours professional experience or 4,000 hours apprenticeship experience under a CFP professional's supervision covering the financial planning process, and commitment to high ethical and conduct standards. Additional information about the CFP designation can be found at [www.cfp.net](http://www.cfp.net).

**Item 3 - Disciplinary Information**

There are no disciplinary events to disclose for Sarah.

**Item 4 - Other Business Activities**

Sarah is an Officer of Bridges Trust Company (a Nebraska chartered trust company). Sarah is not actively engaged in any other business or occupation deemed substantial.

**Item 5 - Additional Compensation**

Sarah does not receive additional economic benefit from any third party for the provision of advisory services.

**Item 6 - Supervision**

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**Form ADV Part 2B - Brochure Supplement**

**March 13, 2024**

**Shelby L. Bruckner, CFP®**

**Bridges Investment Management, Inc.  
13333 California Street Suite 500  
Omaha, NE 68154  
402-397-4700  
[www.bridgesinv.com](http://www.bridgesinv.com)**

This Brochure Supplement provides information about Shelby L. Bruckner that supplements the Bridges Investment Management Brochure. If you have not received our firm's Brochure or have any questions about the contents of this Brochure Supplement, please contact Steve Woodward at 402-397-4700 or [swoodward@bridgestrust.com](mailto:swoodward@bridgestrust.com).

Additional information about Shelby L. Bruckner is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## **Item 2 - Educational Background and Business Experience**

Shelby Bruckner was born in 1991. Shelby received her Bachelor of Science in Business Management from the University of Nebraska at Omaha. Shelby joined the financial services industry in 2012. Her career began as a Financial Representative for Northwestern Mutual from February 2012 to August 2017, then served as a Financial Consultant while affiliated with Equitable Advisors (DBA Nelson Financial Services/Corporate & Endowment Solutions) from September 2017 to December 2020. Shelby joined Bridges Investment Management in January 2021, serving as a member of the Portfolio Management Team and participant in the firm's investment Committee. In August 2023, Shelby continued her career progression within the Bridges organization and was promoted to Senior Portfolio Manager where she manages a portfolio of clients and develops new client relationships.

Shelby is a Certified Financial Planner (CFP®). The CFP Program requires completion of financial planning coursework through a CFP Board Registered Program, a bachelor's degree or higher, CFP exam completion, either 6,000 hours professional experience or 4,000 hours apprenticeship experience under a CFP professional's supervision covering the financial planning process, and commitment to high ethical and conduct standards. Additional information about the CFP designation can be found at [www.cfp.net](http://www.cfp.net).

Additionally, Shelby completed level I of the CFA Institute's Chartered Financial Analyst® program. The CFA Program is organized into three levels, each culminating in an extensive exam, and takes approximately three years to complete. In order to earn a CFA Charter, one must have four years qualified investment work experience, become a member of CFA Institute, pledge to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct, apply for membership to a local CFA member society, and complete the CFA Program. Additional information about the CFA designation can be found at [www.cfainstitute.org](http://www.cfainstitute.org).

## **Item 3 - Disciplinary Information**

There are no disciplinary events to disclose for Shelby.

## **Item 4 - Other Business Activities**

Shelby is an Officer of Bridges Trust Company (a Nebraska chartered trust company). Shelby also volunteers as a board member with the American Cancer Society of Omaha. Shelby is not actively engaged in any other business or occupation deemed substantial.

## **Item 5 - Additional Compensation**

Shelby does not receive additional economic benefit from any third party for the provision of advisory services.

## **Item 6 - Supervision**

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**Form ADV Part 2B - Brochure Supplement**

**March 5, 2024**

**Ryan Gerald Decker, CFP®**

**Bridges Investment Management, Inc.  
13333 California Street Suite 500  
Omaha, NE 68154  
402-397-4700  
[www.bridgesinv.com](http://www.bridgesinv.com)**

This Brochure Supplement provides information about Ryan Gerald Decker that supplements the Bridges Investment Management Brochure. If you have not received our firm's Brochure or have any questions about the contents of this Brochure Supplement, please contact Steve Woodward at 402-397-4700 or [swoodward@bridgestrust.com](mailto:swoodward@bridgestrust.com).

Additional information about Ryan Gerald Decker is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

**Item 2 - Educational Background and Business Experience**

Ryan Decker was born in 1984. Ryan received his Bachelor of Science in Business Administration with an emphasis in Finance from Creighton University in Omaha, Nebraska. Ryan joined the financial services industry in 2014 beginning his career as a Private Client Advisor for First National Wealth Management from 2014-2021, followed by his promotion to Regional Director for First National Wealth Management (DBA First Investments & Planning) from 2021-2024. Ryan joined Bridges Investment Management in February 2024 as a Relationship Manager, Vice President, and participant in the firm's Investment Committee.

Ryan is a Certified Financial Planner (CFP®). The CFP Program requires completion of financial planning coursework through a CFP Board Registered Program, a bachelor's degree or higher, CFP exam completion, either 6,000 hours professional experience or 4,000 hours apprenticeship experience under a CFP professional's supervision covering the financial planning process, and commitment to high ethical and conduct standards. Additional information about the CFP designation can be found at [www.cfp.net](http://www.cfp.net).

**Item 3 - Disciplinary Information**

There are no disciplinary events to disclose for Ryan.

**Item 4 - Other Business Activities**

Ryan is a Vice President of Bridges Trust Company (a Nebraska chartered trust company). Ryan also serves on the Bond Oversight Committee for Westside Community Schools and is Treasurer of Go Beyond Nebraska, a non-profit organization. Ryan is not actively engaged in any other business or occupation deemed substantial.

**Item 5 - Additional Compensation**

Ryan does not receive additional economic benefit from any third party for the provision of advisory services.

**Item 6 - Supervision**

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Edson L. Bridges III ("Ted") is the head of the Investment Committee and is primarily responsible for the supervision of all supervised individuals. Ted is the CEO of Bridges Investment Management, Inc. Ted can be reached at 402-397-4700.

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**Form ADV Part 2B - Brochure Supplement**

**March 12, 2024**

**Connor Pugno, CFA**

**Bridges Investment Management, Inc.  
13333 California Street Suite 500  
Omaha, NE 68154  
402-397-4700  
[www.bridgesinv.com](http://www.bridgesinv.com)**

This Brochure Supplement provides information about Connor Pugno that supplements the Bridges Investment Management Brochure. If you have not received our firm's Brochure or have any questions about the contents of this Brochure Supplement, please contact Steve Woodward at 402-397-4700 or [swoodward@bridgestrust.com](mailto:swoodward@bridgestrust.com).

Additional information about Connor Pugno is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

**Item 2 - Educational Background and Business Experience**

Connor Pugno was born in 1995. Connor graduated from Creighton University's Heider College of Business with a Bachelor of Science in Business Administration specializing in Financial Analysis. Connor worked in Property Management with Union Pacific from May 2015 to May 2016 and joined the financial services industry in 2016 as an Investment Analyst Intern with Dundee Venture Capital and Mutual of Omaha. In July 2017, Connor joined Westwood Holdings Group as an Investment Analyst transitioning to a similar role with Bridges in January 2018 as a Research Analyst and was promoted to Senior Research Analyst in February 2024. Additionally, Connor participates as a member of the firm's Investment Committee.

Connor was granted the designation Chartered Financial Analyst (CFA). In order to earn a CFA Charter, one must have four years qualified investment work experience, become a member of CFA Institute, pledge to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct, apply for membership to a local CFA member society, and complete the CFA Program. The CFA Program is organized into three levels, each culminating in an extensive exam, and takes approximately three years to complete. Additional information about the CFA designation can be found at [www.cfainstitute.org](http://www.cfainstitute.org).

**Item 3 - Disciplinary Information**

There are no disciplinary events to disclose for Connor.

**Item 4 - Other Business Activities**

Connor is an Officer of Bridges Trust Company (a Nebraska chartered trust company). Connor is not actively engaged in any other business or occupation deemed substantial.

**Item 5 - Additional Compensation**

Connor does not receive additional economic benefit from any third party for the provision of advisory services.

**Item 6 - Supervision**

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**Form ADV Part 2B - Brochure Supplement**

**March 5, 2024**

**Samantha L. Rathje, CPA, CFP®**

**Bridges Investment Management, Inc.  
13333 California Street Suite 500  
Omaha, NE 68154  
402-397-4700  
[www.bridgesinv.com](http://www.bridgesinv.com)**

This Brochure Supplement provides information about Samantha Rathje that supplements the Bridges Investment Management Brochure. If you have not received our firm's Brochure or have any questions about the contents of this Brochure Supplement, please contact Steve Woodward at 402-397-4700 or [swoodward@bridgestrust.com](mailto:swoodward@bridgestrust.com).

Additional information about Samantha Rathje is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

**Item 2 - Educational Background and Business Experience**

Samantha L. Rathje was born in 1982. Samantha received her Bachelor of Science in Accounting from the University of Nebraska Lincoln in 2005. After graduation, and until November 2015, Samantha served in Client Services and later as a Staff Accountant with Dana F. Cole & Co. LLP. Samantha transitioned her career in November 2015 to Store Manager of Lincoln Mattress & Furniture Co. until joining Bridges Investment Management in April 2021 as a Client Service Manager and earning a promotion to Portfolio Analyst in February 2024.

Samantha earned her Certified Public Accountant (CPA) license in January 2013, Certified Financial Planner (CFP®) designation in December 2023, and she completed the FINRA Series 65 Uniform Investment Advisor Law exam in 2021. The CPA Program in Nebraska requires completion of the 150-semester hour educational requirement, 16-hour test comprised of four sections, professional ethics examination, work experience requirement, and membership in a local board of accountancy. The CFP Program requires completion of financial planning coursework through a CFP Board Registered Program, a bachelor's degree or higher, CFP exam completion, either 6,000 hours professional experience or 4,000 hours apprenticeship experience under a CFP professional's supervision covering the financial planning process, and commitment to high ethical and conduct standards. Additional information about the CFP designation can be found at [www.cfp.net](http://www.cfp.net).

**Item 3 - Disciplinary Information**

There are no disciplinary events to disclose for Samantha.

**Item 4 - Other Business Activities**

Samantha is an Officer of Bridges Trust Company (a Nebraska chartered trust company). Samantha is also a member of the American Institute of Certified Public Accounts (AICPA) and the Nebraska Society of Certified Public Accountants, but Samantha does not provide tax advice. Samantha is not actively engaged in any other business or occupation deemed substantial.

**Item 5 - Additional Compensation**

Samantha does not receive additional economic benefit from any third party for the provision of advisory services.

**Item 6 - Supervision**

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**Form ADV Part 2B - Brochure Supplement**

**August 23, 2023**

**John W. Darwin**

**Bridges Investment Management, Inc.  
13333 California Street Suite 500  
Omaha, NE 68154  
402-397-4700  
[www.bridgesinv.com](http://www.bridgesinv.com)**

This Brochure Supplement provides information about John Darwin that supplements the Bridges Investment Management Brochure. If you have not received our firm's Brochure or have any questions about the contents of this Brochure Supplement, please contact Steve Woodward at 402-397-4700 or [swoodward@bridgestrust.com](mailto:swoodward@bridgestrust.com).

Additional information about John Darwin is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

**Item 2 - Educational Background and Business Experience**

John Darwin was born in 1991. John received his Bachelor of Arts in English from Creighton University in 2013, and later earned his Master of Business Administration from Creighton in 2019. John began his career as a Content Writer and Editor at Social Media Contractors in 2013, becoming Managing Editor in 2014, and stayed with the company through its acquisition by KreativElement in 2016. John briefly worked at Creighton as a Social Media Strategist, starting in 2016, before serving as Special Assistant to the President and Board Liaison at Creighton from 2017 to 2021 until joining Bridges. John joined Bridges Investment Management in 2021 as a Portfolio Analyst and was promoted to Portfolio Manager in 2023.

John completed the FINRA Series 65 Uniform Investment Advisor exam in 2021. Additionally, John completed levels I & II of the CFA Institute's Chartered Financial Analyst® program. The CFA Program is organized into three levels, each culminating in an extensive exam, and takes approximately three years to complete. In order to earn a CFA Charter, one must have four years qualified investment work experience, become a member of CFA Institute, pledge to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct, apply for membership to a local CFA member society, and complete the CFA Program. Additional information about the CFA designation can be found at [www.cfainstitute.org](http://www.cfainstitute.org).

**Item 3 - Disciplinary Information**

There are no disciplinary events to disclose for John.

**Item 4 - Other Business Activities**

John is an Officer of Bridges Trust Company (a Nebraska chartered trust company). John is not actively engaged in any other business or occupation deemed substantial.

**Item 5 - Additional Compensation**

John does not receive additional economic benefit from any third party for the provision of advisory services.

**Item 6 - Supervision**

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**Form ADV Part 2B - Brochure Supplement**

**December 10, 2022**

**Jillian Ylo, CFP®**

**Bridges Investment Management, Inc.  
13333 California Street Suite 500  
Omaha, NE 68154  
402-397-4700  
[www.bridgesinv.com](http://www.bridgesinv.com)**

This Brochure Supplement provides information about Jillian Ylo that supplements the Bridges Investment Management Brochure. If you have not received our firm's Brochure or have any questions about the contents of this Brochure Supplement, please contact Steve Woodward at 402-397-4700 or [swoodward@bridgestrust.com](mailto:swoodward@bridgestrust.com).

Additional information about Jillian Ylo is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## **Item 2 - Educational Background and Business Experience**

Jillian Ylo was born in 1997 and graduated from Purdue University in West Lafayette, Indiana with a Bachelor of Science emphasizing in Financial Counseling and Planning as well as Selling and Sales Management in May 2020. Jillian joined The Vanguard Group's Financial Advisor Development Program in June 2020 where she completed her FINRA Series 7 General Securities Representative and Series 66 Uniform Combined State Law exams in 2020. Jillian was subsequently certified as a Certified Financial Planner (CFP®) in July 2022 before starting her career with Bridges Investment Management as a Portfolio Analyst in November 2022.

The CFP Program requires completion of financial planning coursework through a CFP Board Registered Program, a bachelor's degree or higher, CFP exam completion, either 6,000 hours professional experience or 4,000 hours apprenticeship experience under a CFP professional's supervision covering the financial planning process, and commitment to high ethical and conduct standards. Additional information about the CFP® designation can be found at [www.cfp.net](http://www.cfp.net).

## **Item 3 - Disciplinary Information**

There are no disciplinary events to disclose for Jillian.

## **Item 4 - Other Business Activities**

Jillian is an Officer of Bridges Trust Company (a Nebraska chartered trust company) and is not actively engaged in any other business or occupation deemed substantial.

## **Item 5 - Additional Compensation**

Jillian does not receive additional economic benefit from any third party for the provision of advisory services.

## **Item 6 - Supervision**

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**Form ADV Part 2B - Brochure Supplement**

**January 31, 2023**

**Adam Jacob Andresen**

**Bridges Investment Management, Inc.  
13333 California Street Suite 500  
Omaha, NE 68154  
402-397-4700  
[www.bridgesinv.com](http://www.bridgesinv.com)**

This Brochure Supplement provides information about Adam Jacob Andresen (“AJ”) that supplements the Bridges Investment Management Brochure. If you have not received our firm's Brochure or have any questions about the contents of this Brochure Supplement, please contact Steve Woodward at 402-397-4700 or [swoodward@bridgestrust.com](mailto:swoodward@bridgestrust.com).

Additional information about AJ Andresen is available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

**Item 2 - Educational Background and Business Experience**

Adam Jacob Andresen (“AJ”) was born in 1994. AJ graduated from the University of Nebraska at Omaha with a Bachelor of Science in Business Administration with concentrations in Investment Science and Portfolio Management, Banking and Financial Markets, and Business Finance. AJ received his Master of Investment Management and Financial Analysis degree from Creighton University in 2021. AJ began his investment industry career with Bridges in 2020 as a Portfolio Analyst studying economic trends, monitoring client portfolio investments, and participating in the firm’s Investment Committee. After briefly leaving Bridges to pursue an external structured products position, AJ resumed his Portfolio Analyst role with Bridges in January 2023.

AJ completed the FINRA Series 65 Uniform Investment Advisor exam in 2021. Additionally, AJ passed level I and is a level II candidate in the Chartered Financial Analyst Institute’s CFA program. The CFA Program is organized into three levels, each culminating in an extensive exam, and takes approximately three years to complete. In order to earn a CFA Charter, one must have four years qualified investment work experience, become a member of CFA Institute, pledge to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct, apply for membership to a local CFA member society, and complete the CFA Program. Additional information about the CFA designation can be found at [www.cfainstitute.org](http://www.cfainstitute.org).

**Item 3 - Disciplinary Information**

There are no disciplinary events to disclose for AJ.

**Item 4 - Other Business Activities**

AJ is an Officer of Bridges Trust Company (a Nebraska chartered trust company). AJ is not actively engaged in any other business or occupation deemed substantial.

**Item 5 - Additional Compensation**

AJ does not receive additional economic benefit from any third party for the provision of advisory services.

**Item 6 - Supervision**

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Edson L. Bridges III (“Ted”) is the head of the Investment Committee and is primarily responsible for the supervision of all supervised individuals. Ted is the CEO of Bridges Investment Management, Inc. and can be reached at 402-397-4700.

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**March 12, 2024**

**Daniel M. Podpeskar, CFA**

**Bridges Investment Management, Inc.  
13333 California Street Suite 500  
Omaha, NE 68154  
402-397-4700  
[www.bridgesinv.com](http://www.bridgesinv.com)**

This Brochure Supplement provides information about Daniel M. Podpeskar that supplements the Bridges Investment Management Brochure. If you have not received our firm's Brochure or have any questions about the contents of this Brochure Supplement, please contact Steve Woodward at 402-397-4700 or [swoodward@bridgestrust.com](mailto:swoodward@bridgestrust.com).

Additional information about Daniel M. Podpeskar is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

**Item 2 - Educational Background and Business Experience**

Daniel (“Dan”) Podpeskar (“Dan”) was born in 1995. Dan graduated from Creighton University’s Heider College of Business with a Bachelor of Science in Business Administration concentrated in Financial Analysis and Economics. Dan began his investment career in May of 2017 working in asset management and financial reporting for Midwest Housing Equity Group. He then transitioned his career to TD Ameritrade in early 2018, where he served as an Investor Services Representative and Retail Trading Representative. Dan joined Bridges Investment Management in April of 2019 as a Research Analyst and was promoted to Senior Research Analyst in February 2024. Additionally, Dan participates as a member of the firm’s Investment Committee.

Dan was granted the designation Chartered Financial Analyst (CFA) in 2023. In order to earn a CFA Charter, one must have four years of qualified investment work experience, become a member of CFA Institute, pledge to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct, apply for membership to a local CFA member society, and complete the CFA Program. The CFA Program is organized into three levels, each culminating in an extensive exam, and takes approximately three years to complete. Additional information about the CFA designation can be found at [www.cfainstitute.org](http://www.cfainstitute.org).

**Item 3 - Disciplinary Information**

There are no disciplinary events to disclose for Dan.

**Item 4 - Other Business Activities**

Dan is a Research Analyst at Bridges Trust Company (a Nebraska chartered trust company). Dan is not actively engaged in any other business or occupation deemed substantial.

**Item 5 - Additional Compensation**

Dan does not receive additional economic benefit from any third party for the provision of advisory services.

**Item 6 - Supervision**

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**Form ADV Part 2B - Brochure Supplement**

**July 10, 2023**

**Andrew L. Blum**

**Bridges Investment Management, Inc.  
13333 California Street Suite 500  
Omaha, NE 68154  
402-397-4700  
[www.bridgesinv.com](http://www.bridgesinv.com)**

This Brochure Supplement provides information about Andrew Blum that supplements the Bridges Investment Management Brochure. If you have not received our firm's Brochure or have any questions about the contents of this Brochure Supplement, please contact Steve Woodward at 402-397-4700 or [swoodward@bridgestrust.com](mailto:swoodward@bridgestrust.com).

Additional information about Andrew Blum is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

**Item 2 - Educational Background and Business Experience**

Andrew L. Blum was born in 1999. Andrew received a Bachelor of Science in Financial Management with a minor in Accounting Information Systems from Northwest Missouri State University in 2022. Andrew began his investment industry career with Bridges Investment Management in February of 2023 working as a Client Service Associate and completed the FINRA Series 65 Uniform Investment Advisor exam in 2023.

**Item 3 - Disciplinary Information**

There are no disciplinary events to disclose for Andrew.

**Item 4 - Other Business Activities**

Andrew is an Officer of Bridges Trust Company (a Nebraska chartered trust company). Andrew is not actively engaged in any other business or occupation deemed substantial.

**Item 5 - Additional Compensation**

Andrew does not receive additional economic benefit from any third party for the provision of advisory services.

**Item 6 - Supervision**

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**Form ADV Part 2B - Brochure Supplement**

**March 12, 2024**

**Clayton Cole Anderson**

**Bridges Investment Management, Inc.  
13333 California Street Suite 500  
Omaha, NE 68154  
402-397-4700  
[www.bridgesinv.com](http://www.bridgesinv.com)**

This Brochure Supplement provides information about Clayton Cole Anderson that supplements the Bridges Investment Management Brochure. If you have not received our firm's Brochure or have any questions about the contents of this Brochure Supplement, please contact Steve Woodward at 402-397-4700 or [swoodward@bridgestrust.com](mailto:swoodward@bridgestrust.com).

Additional information about Clayton Cole Anderson is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov)

**Item 2 - Educational Background and Business Experience**

Clayton Cole Anderson (“Cole”) was born in 1996. Cole received a Bachelor of Science in Marketing in 2017 and a Master of Science in Family Financial Planning in 2019 from Iowa State University. Cole began his investment industry career with Bridges Investment Management in 2023 as a Client Service Associate and subsequently completed the FINRA Series 65 Uniform Investment Advisor exam, after which, he earned a promotion to Portfolio Analyst. Prior to working in the investment industry, Cole worked in the technology and home improvement sales industry as both a sales representative and a sales consultant from 2019 to 2023.

**Item 3 - Disciplinary Information**

There are no disciplinary events to disclose for Cole.

**Item 4 - Other Business Activities**

Cole is an Officer of Bridges Trust Company (a Nebraska chartered trust company) and is not actively engaged in any other business or occupation deemed substantial.

**Item 5 - Additional Compensation**

Cole does not receive additional economic benefit from any third party for the provision of advisory services.

**Item 6 - Supervision**

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**Form ADV Part 2B - Brochure Supplement**

**January 30, 2024**

**Haley Ann Gilbertson**

**Bridges Investment Management, Inc.  
13333 California Street Suite 500  
Omaha, NE 68154  
402-397-4700  
[www.bridgesinv.com](http://www.bridgesinv.com)**

This Brochure Supplement provides information about Haley Ann Gilbertson that supplements the Bridges Investment Management Brochure. If you have not received our firm's Brochure or have any questions about the contents of this Brochure Supplement, please contact Steve Woodward at 402-397-4700 or [swoodward@bridgestrust.com](mailto:swoodward@bridgestrust.com).

Additional information about Haley Ann Gilbertson is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov)

**Item 2 - Educational Background and Business Experience**

Haley Ann Gilbertson was born in 2000. Haley received a Bachelor of Science in Finance and Business Intelligence and Analytics in 2022 from Creighton University. Haley began her investment industry career in 2021 as a Research Analyst Intern for Bridges Investment Management. She now works as a Portfolio Analyst and completed the FINRA Series 65 Uniform Investment Advisor exam in 2024.

Additionally, Haley passed level I and is a level II candidate in the Chartered Financial Analyst Institute's CFA program. The CFA Program is organized into three levels, each culminating in an extensive exam, and takes approximately three years to complete. In order to earn a CFA Charter, one must have four years qualified investment work experience, become a member of CFA Institute, pledge to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct, apply for membership to a local CFA member society, and complete the CFA Program. Additional information about the CFA designation can be found at [www.cfainstitute.org](http://www.cfainstitute.org).

**Item 3 - Disciplinary Information**

There are no disciplinary events to disclose for Haley.

**Item 4 - Other Business Activities**

Haley is an Officer of Bridges Trust Company (a Nebraska chartered trust company) and is not actively engaged in any other business or occupation deemed substantial.

**Item 5 - Additional Compensation**

Haley does not receive additional economic benefit from any third party for the provision of advisory services.

**Item 6 - Supervision**

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