

July 29, 2024

**NICHOLAS A. WILWERDING, CFA, CAP®**

Bridges Investment Management, Inc.  
13333 California Street Suite 500  
Omaha, NE 68154  
402.397.4700

This brochure supplement provides information about Nicholas A. Wilwerding that supplements the Bridges Investment Management, Inc. brochure. You should have received a copy of that brochure. Please contact Bridges Investment Management, Inc.'s Chief Compliance Officer at 402.397.4700 if you did not receive Bridges Investment Management, Inc.'s brochure or if you have any questions about the contents of this supplement.

Additional information about Nicholas A. 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 A. Wilwerding ("Nick") became the CEO and Chairman of Bridges Investment Management, Inc. ("BIM") in July 2024, adding to his existing roles as President and Director beginning in February 2022. Nick also held titles of progressing responsibility including COO from February 2022 to July 2024, Treasurer from January to July 2024, Executive Vice President from May 2021 to February 2022, and Senior Vice President from January 2018 to May 2021. Prior to joining BIM, Nick served as President of Westwood Trust's Western Region from March 2017 to January 2018 and held various titles as he progressed through the organization beginning in November 2010, when Westwood Advisors (formerly known as McCarthy Group Advisors, LLC) was acquired by Westwood Holdings Group, Inc. Nick's investment industry career began in 2006 as an analyst for McCarthy Group Advisors, LLC.

**Birthyear:** 1982

**Education:** Bachelor of Science in Business Administration - Creighton University

**Professional Designations:** Chartered Financial Analyst® & Chartered Advisor in Philanthropy®

*Chartered Financial Analyst® (CFA®) charterholders earn the right to use the CFA® designation by adhering to CFA Institute's membership and professional conduct standards, successfully completing the CFA Program's three levels (Approx. 900 hours of study), attaining 4 years professional work experience in the investment decision process as well as a bachelor's degree or equivalent education/experience, and fulfilling local CFA member society requirements. CFA® and Chartered Financial Analyst® are registered trademarks owned by CFA Institute with further information available at [www.cfainstitute.org](http://www.cfainstitute.org).*

*Chartered Advisor in Philanthropy® (CAP®) charterholders earn the right to use the CAP® designation by adhering to ACFP's Code of Ethics, completing annual recertification, attaining three years' experience advising individual or charitable organizations in wealth and estate planning, charitable giving, nonprofit foundation management services, investment management of charitable assets, and accounting, successfully completing three graduate level courses, and three qualifying exams. CAP® and Chartered Advisor in Philanthropy® are registered trademarks owned by The American College of Financial Planning with further information available at [www.theamericancollege.edu/designations-degrees/CAP](http://www.theamericancollege.edu/designations-degrees/CAP).*

**ITEM 3 | DISCIPLINARY INFORMATION**

Nick has no legal or disciplinary events to report.

**ITEM 4 | OTHER BUSINESS ACTIVITIES**

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

**ITEM 5 | ADDITIONAL COMPENSATION**

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

**ITEM 6 | SUPERVISION**

The Firm supervises its investment adviser representatives' advisory activities according to various functional areas, appointing one or more individuals as designated supervisors for each area. The Firm monitors supervised persons' investment advice by reviewing client account investment parameters, allocations and trading activity, among other things. The Firm's Chief Executive Officer, Nick Wilwerding, is responsible for supervised persons' advisory activities on behalf of the Firm and can be reached at 402-397-4700.

January 2, 2025

**JACK J. HOLMES, CFA, CAP®**

Bridges Investment Management, Inc.  
13333 California Street Suite 500  
Omaha, NE 68154  
402.397.4700

This brochure supplement provides information about Jack J. Holmes that supplements the Bridges Investment Management, Inc. brochure. You should have received a copy of that brochure. Please contact Bridges Investment Management, Inc.'s Chief Compliance Officer at 402.397.4700 if you did not receive Bridges Investment Management, Inc.'s brochure or if you have any questions about the contents of this supplement.

Additional information about Jack J. 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 became the Chief Investment Officer ("CIO") of Bridges Investment Management, Inc. ("BIM") in July 2024 and serves BIM clients as a Relationship Manager, Senior Vice President, Director, and Investment Committee member since joining the firm in April 2021. Jack also serves as a portfolio manager to the Bridges Investment Fund (Symbol: BRGIX). Prior to joining BIM, Jack served in a CIO capacity for over six years with his financial services career beginning in 2007 and progressing to positions of increasing responsibility.

More specifically, Jack served as CIO and Managing Member of WealthPlan Investment Management LLC from October 2020 to April 2021, CIO of WealthPlan Partners, LLC from February 2020 to December 2020, Administrative Associate at WealthPlan Partners LLC from January 2015 to February 2020, Investment Officer and Analyst at First Nebraska Trust Company from August 2011 to December 2014, and various roles at TD Ameritrade in retirement account services and internal audit from 2007 to 2011.

**Birthyear:** 1983

**Education:** Bachelor of Science in Business Administration - Colorado State University  
Master of Security Analysis & Portfolio Management - Creighton University

**Professional Designations:** Chartered Financial Analyst® & Chartered Advisor in Philanthropy®

*Chartered Financial Analyst® (CFA®) charterholders earn the right to use the CFA® designation by adhering to CFA Institute's membership and professional conduct standards, successfully completing the CFA Program's three levels (Approx. 900 hours of study), attaining 4 years professional work experience in the investment decision process as well as a bachelor's degree or equivalent education/experience, and fulfilling local CFA member society requirements. CFA® and Chartered Financial Analyst® are registered trademarks owned by CFA Institute with further information available at [www.cfainstitute.org](http://www.cfainstitute.org).*

*Chartered Advisor in Philanthropy® (CAP®) charterholders earn the right to use the CAP® designation by adhering to ACFP's Code of Ethics, completing annual recertification, attaining three years' experience advising individual or charitable organizations in wealth and estate planning, charitable giving, nonprofit foundation management services, investment management of charitable assets, and accounting, successfully completing three graduate level courses, and three qualifying exams. CAP® and Chartered Advisor in Philanthropy® are registered trademarks owned by The American College of Financial Planning with further information available at [www.theamericancollege.edu/designations-degrees/CAP](http://www.theamericancollege.edu/designations-degrees/CAP).*

**ITEM 3 | DISCIPLINARY INFORMATION**

Jack has no legal or disciplinary events to report.

**ITEM 4 | OTHER BUSINESS ACTIVITIES**

Jack is a Senior Vice President of Bridges Trust Company (a Nebraska chartered trust company) and Bridges Private Equity Fund Investment Committee member. 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 to clients.

**ITEM 6 | SUPERVISION**

The Firm supervises its investment adviser representatives' advisory activities according to various functional areas, appointing one or more individuals as designated supervisors for each area. The Firm monitors supervised persons' investment advice by reviewing client account investment parameters, allocations and trading activity, among other things. The Firm's Chief Executive Officer, Nick Wilwerding, is responsible for supervised persons' advisory activities on behalf of the Firm and can be reached at 402-397-4700.

July 29, 2024

**MEGAN M. MCMURRY, CFP®, CAP®**

Bridges Investment Management, Inc.  
13333 California Street Suite 500  
Omaha, NE 68154  
402.397.4700

This brochure supplement provides information about Megan McMurry that supplements the Bridges Investment Management, Inc. brochure. You should have received a copy of that brochure. Please contact Bridges Investment Management, Inc.'s Chief Compliance Officer at 402.397.4700 if you did not receive Bridges Investment Management, Inc.'s brochure or if you have any questions about the contents of this supplement.

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 currently holds the title of Executive Vice President of Relationship Management and a member to the Investment Committee. Megan was previously a Senior Vice President from January 2021 to February 2023 with Bridges. Megan joined Bridges Investment Management as a Vice President in September 2017. Megan began her investment industry career as a Financial Advisor/Wealth Planning Analyst at UBS Financial Services in Omaha from August 2014 to August of 2017. Megan has passed level I out of three levels of the Chartered Financial Analyst® program.

**Birthyear:** 1982

**Education:** Bachelor of Business Administration and Bachelor of Accounting - Concordia University  
Master of Accountancy - University of New Orleans

**Professional Designations:** Certified Financial Planner (CFP®) & Chartered Advisor in Philanthropy (CAP®)

*Certified Financial Planner (CFP®) 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).*

*Chartered Advisor in Philanthropy® (CAP®) charterholders earn the right to use the CAP® designation by adhering to ACFP's Code of Ethics, completing annual recertification, attaining three years' experience advising individual or charitable organizations in wealth and estate planning, charitable giving, nonprofit foundation management services, investment management of charitable assets, and accounting, successfully completing three graduate level courses, and three qualifying exams. CAP® and Chartered Advisor in Philanthropy® are registered trademarks owned by The American College of Financial Planning with further information available at [www.theamericancollege.edu/designations-degrees/CAP](http://www.theamericancollege.edu/designations-degrees/CAP).*

**ITEM 3 | DISCIPLINARY INFORMATION**

Megan has no legal or disciplinary events to report.

**ITEM 4 | OTHER BUSINESS ACTIVITIES**

Megan is an Executive Vice President of Bridges Trust Company (a Nebraska chartered trust company). Megan is also a Salvation Army (Western Division) Advisory Board Member and Chair of the charity's Social Services Committee; 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 to clients.

**ITEM 6 | SUPERVISION**

The Firm supervises its investment adviser representatives' advisory activities according to various functional areas, appointing one or more individuals as designated supervisors for each area. The Firm monitors supervised persons' investment advice by reviewing client account investment parameters, allocations and trading activity, among other things. The Firm's Chief Executive Officer, Nick Wilwerding, is responsible for supervised persons' advisory activities on behalf of the Firm and can be reached at 402-397-4700.

July 29, 2024

**MICHAEL G. APP, CAP®**

Bridges Investment Management, Inc.  
13333 California Street Suite 500  
Omaha, NE 68154  
402.397.4700

This brochure supplement provides information about Michael G. App that supplements the Bridges Investment Management, Inc. brochure. You should have received a copy of that brochure. Please contact Bridges Investment Management, Inc.'s Chief Compliance Officer at 402.397.4700 if you did not receive Bridges Investment Management, Inc.'s brochure or if you have any questions about the contents of this supplement.

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") is currently a Relationship Manager, 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.

**Birthyear:** 1966

**Education:** Bachelor of Science in Business Administration - Creighton University

**Professional Designations:** Chartered Advisor in Philanthropy®

*Chartered Advisor in Philanthropy® (CAP®) charterholders earn the right to use the CAP® designation by adhering to ACFP's Code of Ethics, completing annual recertification, attaining three years' experience advising individual or charitable organizations in wealth and estate planning, charitable giving, nonprofit foundation management services, investment management of charitable assets, and accounting, successfully completing three graduate level courses, and three qualifying exams. CAP® and Chartered Advisor in Philanthropy® are registered trademarks owned by The American College of Financial Planning with further information available at [www.theamericancollege.edu/designations-degrees/CAP](http://www.theamericancollege.edu/designations-degrees/CAP).*

**ITEM 3 | DISCIPLINARY INFORMATION**

Mike has no legal or disciplinary events to report.

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

**ITEM 6 | SUPERVISION**

The Firm supervises its investment adviser representatives' advisory activities according to various functional areas, appointing one or more individuals as designated supervisors for each area. The Firm monitors supervised persons' investment advice by reviewing client account investment parameters, allocations and trading activity, among other things. The Firm's Chief Executive Officer, Nick Wilwerding, is responsible for supervised persons' advisory activities on behalf of the Firm and can be reached at 402-397-4700.

July 29, 2024

**DOUGLAS R. PLAHN, CFA**

Bridges Investment Management, Inc.  
13333 California Street Suite 500  
Omaha, NE 68154  
402.397.4700

This brochure supplement provides information about Douglas R. Plahn that supplements the Bridges Investment Management, Inc. brochure. You should have received a copy of that brochure. Please contact Bridges Investment Management, Inc.'s Chief Compliance Officer at 402.397.4700 if you did not receive Bridges Investment Management, Inc.'s brochure or if you have any questions about the contents of this supplement.

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") is currently a Relationship Manager and Senior Vice President of Bridges Investment Management. He is also a Director of BIM and a member of the Investment Committee. Doug began his investment industry career in 1993 with Bridges and has held numerous titles as he progressed through the organization.

**Birthyear:** 1970

**Education:** Bachelor of Science in Accounting - University of Nebraska - Lincoln

**Professional Designations:** Chartered Financial Analyst®

*Chartered Financial Analyst® (CFA®) charterholders earn the right to use the CFA® designation by adhering to CFA Institute's membership and professional conduct standards, successfully completing the CFA Program's three levels (Approx. 900 hours of study), attaining 4 years professional work experience in the investment decision process as well as a bachelor's degree or equivalent education/experience, and fulfilling local CFA member society requirements. CFA® and Chartered Financial Analyst® are registered trademarks owned by CFA Institute with further information available at [www.cfainstitute.org](http://www.cfainstitute.org).*

**ITEM 3 | DISCIPLINARY INFORMATION**

Doug has no legal or disciplinary events to report.

**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**

The Firm supervises its investment adviser representatives' advisory activities according to various functional areas, appointing one or more individuals as designated supervisors for each area. The Firm monitors supervised persons' investment advice by reviewing client account investment parameters, allocations and trading activity, among other things. The Firm's Chief Executive Officer, Nick Wilwerding, is responsible for supervised persons' advisory activities on behalf of the Firm and can be reached at 402-397-4700.



July 29, 2024

**BRETT R. LINDSTROM, CAP®**

Bridges Investment Management, Inc.  
13333 California Street Suite 500  
Omaha, NE 68154  
402.397.4700

This brochure supplement provides information about Brett R. Lindstrom that supplements the Bridges Investment Management, Inc. brochure. You should have received a copy of that brochure. Please contact Bridges Investment Management, Inc.'s Chief Compliance Officer at 402.397.4700 if you did not receive Bridges Investment Management, Inc.'s brochure or if you have any questions about the contents of this supplement.

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 started at Bridges Investment Management, Inc. in September 2022 and is a Senior Vice President and Relationship Manager. 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 June 2004 to September 2010 and under the UBS umbrella from September 2010 to September 2022.

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.

**Birthyear:** 1981

**Education:** Bachelor of Science in History - University of Nebraska - Lincoln

**Professional Designations:** Chartered Advisor in Philanthropy®

*Chartered Advisor in Philanthropy® (CAP®) charterholders earn the right to use the CAP® designation by adhering to ACFP's Code of Ethics, completing annual recertification, attaining three years' experience advising individual or charitable organizations in wealth and estate planning, charitable giving, nonprofit foundation management services, investment management of charitable assets, and accounting, successfully completing three graduate level courses, and three qualifying exams. CAP® and Chartered Advisor in Philanthropy® are registered trademarks owned by The American College of Financial Planning with further information available at [www.theamericancollege.edu/designations-degrees/CAP](http://www.theamericancollege.edu/designations-degrees/CAP).*

**ITEM 3 | DISCIPLINARY INFORMATION**

Brett has no legal or disciplinary events to report.

**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 to clients.

**ITEM 6 | SUPERVISION**

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July 29, 2024

**SARAH F. MURRAY, CFA, CIPM**

Bridges Investment Management, Inc.  
13333 California Street Suite 500  
Omaha, NE 68154  
402.397.4700

This brochure supplement provides information about Sarah F. Murray that supplements the Bridges Investment Management, Inc. brochure. You should have received a copy of that brochure. Please contact Bridges Investment Management, Inc.'s Chief Compliance Officer at 402.397.4700 if you did not receive Bridges Investment Management, Inc.'s brochure or if you have any questions about the contents of this supplement.

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 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.

**Birthyear:** 1986

**Education:** Bachelor of Business Administration - University of Missouri at Kansas City  
Master of Security Analysis and Portfolio Management - Creighton University  
Master of Business Administration - Creighton University

**Professional Designations:** Chartered Financial Analyst® & Certificate in Investment Performance Measurement™

*Chartered Financial Analyst® (CFA®) charterholders earn the right to use the CFA® designation by adhering to CFA Institute's membership and professional conduct standards, successfully completing the CFA Program's three levels (Approx. 900 hours of study), attaining 4 years professional work experience in the investment decision process as well as a bachelor's degree or equivalent education/experience, and fulfilling local CFA member society requirements. CFA® and Chartered Financial Analyst® are registered trademarks owned by CFA Institute with further information available at [www.cfainstitute.org](http://www.cfainstitute.org).*

*Certificate in Investment Performance Measurement® (CIPM®) is a specialized course of study through CFA Institute 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®). CIPM® certification requirements include qualifying for the CIPM® program by completing the CFA® Level II exam or be a CFA® Charterholder and passing two exams averaging 155 hours of study per exam. Additional information at [www.cfainstitute.org/programs/cipm](http://www.cfainstitute.org/programs/cipm).*

**ITEM 3 | DISCIPLINARY INFORMATION**

Sarah has no legal or disciplinary events to report.

**ITEM 4 | OTHER BUSINESS ACTIVITIES**

Sarah is a Vice President of Bridges Trust Company (a Nebraska chartered trust company), Secretary 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 to clients.

**ITEM 6 | SUPERVISION**

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July 29, 2024

**RYAN G. DECKER, CFP®**

Bridges Investment Management, Inc.  
13333 California Street Suite 500  
Omaha, NE 68154  
402.397.4700

This brochure supplement provides information about Ryan G. Decker that supplements the Bridges Investment Management, Inc. brochure. You should have received a copy of that brochure. Please contact Bridges Investment Management, Inc.'s Chief Compliance Officer at 402.397.4700 if you did not receive Bridges Investment Management, Inc.'s brochure or if you have any questions about the contents of this supplement.

Additional information about Ryan G. 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 G. Decker joined Bridges Investment Management, Inc. in February 2024 as a Relationship Manager, Vice President, and participant in the firm's Investment Committee. Ryan was the Regional Director for First National Wealth Management from December 2020 to February 2024. Ryan began his career as a Private Client Advisor for First National Wealth Management from July 2014 to February 2021.

**Birthyear:** 1984

**Education:** Bachelor of Science in Business Administration with an emphasis in Finance - Creighton University

**Professional Designations:** Certified Financial Planner (CFP®)

*Certified Financial Planner (CFP®) 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**

Ryan has no legal or disciplinary events to report.

**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 to clients.

**ITEM 6 | SUPERVISION**

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August 13, 2024

**NANCY K. DODGE, CTFA**

Bridges Investment Management, Inc.  
13333 California Street Suite 500  
Omaha, NE 68154  
402.397.4700

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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 began her investment industry career in 1980 as an Assistant to the President of Bridges Investment Counsel. Nancy continued to serve the Firm's clients as they transitioned to Bridges Investment Management, Inc. while registering with Bridges Investment Management, Inc. in February 2000 as a Vice President and is currently a Client Service Manager.

**Birthyear:** 1961

**Professional Designations:** Certified Trust and Financial Advisor (CTFA)

*Certified Trust and Fiduciary Advisor (CTFA)* certificants are individuals who have earned the right to use the CTFA designation granted by the American Bankers Association ("ABA"). Use of the designation requires adherence to ABA's membership, Professional Code of Ethics, and 45 continuing education credits every 3 years. Minimum requirements include a minimum of 3 years' experience in the wealth management field, successful completion of an ABA Institute wealth management program if having less than 5 years of wealth management experience, successful completion of the CTFA exam, and completion of ABA Professional Certifications Code of Ethics and background reporting. *Additional information at [www.aba.com/training-events/certifications/certified-trust-and-fiduciary-advisor](http://www.aba.com/training-events/certifications/certified-trust-and-fiduciary-advisor).*

**ITEM 3 | DISCIPLINARY INFORMATION**

Nancy has no legal or disciplinary events to report.

**ITEM 4 | OTHER BUSINESS ACTIVITIES**

Nancy serves as a Vice President of Bridges Trust Company (a Nebraska chartered trust company). 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 to clients.

**ITEM 6 | SUPERVISION**

The Firm supervises its investment adviser representatives' advisory activities according to various functional areas, appointing one or more individuals as designated supervisors for each area. The Firm monitors supervised persons' investment advice by reviewing client account investment parameters, allocations and trading activity, among other things. The Firm's Chief Executive Officer, Nick Wilwerding, is responsible for supervised persons' advisory activities on behalf of the Firm and can be reached at 402-397-4700.

July 29, 2024

**DEBORAH L. GRANT**

Bridges Investment Management, Inc.  
13333 California Street Suite 500  
Omaha, NE 68154  
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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") is currently serves as a Vice President of Bridges Investment Management, Inc focusing on client service relationship. 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 Bridges Investment Management organization.

Birthyear: 1958

**ITEM 3 | DISCIPLINARY INFORMATION**

Deb has no legal or disciplinary events to report.

**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 to clients.

**ITEM 6 | SUPERVISION**

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July 29, 2024

**BLAKE GUNDERSON**

Bridges Investment Management, Inc.  
13333 California Street Suite 500  
Omaha, NE 68154  
402.397.4700

This brochure supplement provides information about Blake Gunderson that supplements Bridges Investment Management, Inc. brochure. You should have received a copy of that brochure. Please contact Bridges Investment Management, Inc.'s Chief Compliance Officer at 402.397.4700 if you did not receive Bridges Investment Management, Inc.'s brochure or if you have any questions about the contents of this supplement. Additional information is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

**ITEM 2 | EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE**

Blake Gunderson joined Bridges Investment Management, Inc. in June 2024 as a Vice President, Relationship Manager and participant in the Firm's Investment Committee. Previously, Blake held roles as a wealth advisor and Vice President with Bernstein Private Wealth Management from April 2022 to June 2024, VP with U.S. Bank from March 2020 to April 2022, and Wealth Advisor for The First National Bank in Sioux Falls from March 2018 to March 2020. Blake began his career in the financial services industry in October 2015 as a Financial Institution Examiner for the South Dakota Division of Banking.

**Birthyear:** 1990

**Education:** Bachelor of Business Administration - University of South Dakota  
Master of Business Administration - University of South Dakota  
Juris Doctorate - University of South Dakota

**ITEM 3 | DISCIPLINARY INFORMATION**

Blake has no legal or disciplinary events to report.

**ITEM 4 | OTHER BUSINESS ACTIVITIES**

Blake is a Vice President of Bridges Trust Company (a Nebraska chartered trust company). He is also involved with several organizations including minority ownership of Gunderson's Jewelry as well as Bison LLC, a property and equipment ownership company. Blake is not actively engaged in any other business or occupation deemed substantial.

**ITEM 5 | ADDITIONAL COMPENSATION**

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

**ITEM 6 | SUPERVISION**

The Firm supervises its investment adviser representatives' advisory activities according to various functional areas, appointing one or more individuals as designated supervisors for each area. The Firm monitors supervised persons' investment advice by reviewing client account investment parameters, allocations and trading activity, among other things. The Firm's Chief Executive Officer, Nick Wilwerding, is responsible for supervised persons' advisory activities on behalf of the Firm and can be reached at 402-397-4700.

July 29, 2024

**NICKOLAUS L. SHANNON, CRPC®**

Bridges Investment Management, Inc.  
13333 California Street Suite 500  
Omaha, NE 68154  
402.397.4700

This brochure supplement provides information about Nickolaus L. Shannon that supplements the Bridges Investment Management, Inc. brochure. You should have received a copy of that brochure. Please contact Bridges Investment Management, Inc.'s Chief Compliance Officer at 402.397.4700 if you did not receive Bridges Investment Management, Inc.'s brochure or if you have any questions about the contents of this supplement.

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

**ITEM 2 | EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE**

Nickolaus Lee Shannon ("Nick") joined Bridges Investment Management in June 2024 as a Vice President, Relationship Manager and as an Investment Committee participant. Prior to joining Bridges, Nick served as the Founder and Financial Advisor of Prestige Wealth, LLC from March 2023 to June 2024. Nick also was a Senior Partner at inSOURCE Financial Advisors from May 2022 to December 2022 and previously held executive leadership roles with Prudential Advisors from November 2017 to May 2022, where he ultimately served as a Managing Director. Nick started his career in the financial services industry in November 2011 as an Investment Manager with LPL Financial.

**Birthyear:** 1987

**Education:** Bachelor of Science in Business Administration - Bakersfield in Bakersfield, California

**Professional Designations:** Chartered Retirement Planning Counselor<sup>SM</sup> (CRPC®)

*Chartered Retirement Planning Counselor (CRPC®)* requires completion of financial planning coursework through the College of Financial Planning and includes training in making a comprehensive assessment of an individual's financial needs before or after retirement, including sources of retirement income, personal savings, income taxes, estate planning, and more. Successful applicants earn the right to use this designation for two years and must complete 16 hours of continuing education every two years to continue using the designation thereafter. Further information at [www.kaplanfinancial.com/wealth-management/crpc](http://www.kaplanfinancial.com/wealth-management/crpc).

**ITEM 3 | DISCIPLINARY INFORMATION**

Nick has no legal or disciplinary events to report.

**ITEM 4 | OTHER BUSINESS ACTIVITIES**

Nick is a Vice President of Bridges Trust Company (a Nebraska chartered trust company). Nick also serves on the Investment and Finance committees for the Ronald McDonald House Charities Omaha, as a Board Member for the Metropolitan Community College Foundation, as a Board Member for the Salvation Army Echelon Omaha, and as a Board Member for the TeamMates Mentoring Program of Elkhorn. 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 to clients.

**ITEM 6 | SUPERVISION**

The Firm supervises its investment adviser representatives' advisory activities according to various functional areas, appointing one or more individuals as designated supervisors for each area. The Firm monitors supervised persons' investment advice by reviewing client account investment parameters, allocations and trading activity, among other things. The Firm's Chief Executive Officer, Nick Wilwerding, is responsible for supervised persons' advisory activities on behalf of the Firm and can be reached at 402-397-4700.

July 29, 2024

**SHELBY L. BRUCKNER, CFP®**

Bridges Investment Management, Inc.  
13333 California Street Suite 500  
Omaha, NE 68154  
402.397.4700

This brochure supplement provides information about Shelby L. Bruckner that supplements the Bridges Investment Management, Inc. brochure. You should have received a copy of that brochure. Please contact Bridges Investment Management, Inc.'s Chief Compliance Officer at 402.397.4700 if you did not receive Bridges Investment Management, Inc.'s brochure or if you have any questions about the contents of this supplement.

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 L. Bruckner is currently a Senior Portfolio Manager at Bridges Investment Management, where she manages a portfolio of clients and develops new client relationships. 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. Shelby served as a Financial Consultant while affiliated with Equitable Advisors (DBA Nelson Financial Services/Corporate & Endowment Solutions) from September 2017 to December 2020. Her career began as a Financial Representative for Northwestern Mutual from February 2012 to August 2017. Shelby has passed level I of the CFA Institute's Chartered Financial Analyst® program.

**Birthyear:** 1991

**Education:** Bachelor of Science in Business Management - University of Nebraska at Omaha

**Professional Designations:** Certified Financial Planner (CFP®)

*Certified Financial Planner (CFP®) 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**

Shelby has no legal or disciplinary events to report.

**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 to clients.

**ITEM 6 | SUPERVISION**

The Firm supervises its investment adviser representatives' advisory activities according to various functional areas, appointing one or more individuals as designated supervisors for each area. The Firm monitors supervised persons' investment advice by reviewing client account investment parameters, allocations and trading activity, among other things. The Firm's Chief Executive Officer, Nick Wilwerding, is responsible for supervised persons' advisory activities on behalf of the Firm and can be reached at 402-397-4700.



August 8, 2024

**JOHN W. DARWIN, CFA**

Bridges Investment Management, Inc.  
13333 California Street Suite 500  
Omaha, NE 68154  
402.397.4700

This brochure supplement provides information about John W. Darwin that supplements the Bridges Investment Management, Inc. brochure. You should have received a copy of that brochure. Please contact Bridges Investment Management, Inc.'s Chief Compliance Officer at 402.397.4700 if you did not receive Bridges Investment Management, Inc.'s brochure or if you have any questions about the contents of this supplement.

Additional information about John W. 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 W. Darwin was promoted in July 2024 to Senior Portfolio Manager at Bridges Investment Management. John joined Bridges in June of 2021 as a Portfolio Analyst and transitioned to Portfolio Manager in 2023. John briefly worked at Creighton as a Social Media Strategist, starting in July 2016, before serving as Special Assistant to the President and Board Liaison at Creighton from February 2017 to May 2021 until joining Bridges. He began his career as a Content Writer and Editor at Social Media Contractors in May 2013, becoming Managing Editor in January 2014, and stayed with the company through its acquisition by KreativElement in 2016.

**Birthyear:** 1991

**Education:** Bachelor of Arts in English - Creighton University  
Master of Business Administration - Creighton University

**Professional Designations:** Chartered Financial Analyst®

*Chartered Financial Analyst® (CFA®) charterholders earn the right to use the CFA® designation by adhering to CFA Institute's membership and professional conduct standards, successfully completing the CFA Program's three levels (Approx. 900 hours of study), attaining 4 years professional work experience in the investment decision process as well as a bachelor's degree or equivalent education/experience, and fulfilling local CFA member society requirements. CFA® and Chartered Financial Analyst® are registered trademarks owned by CFA Institute with further information available at [www.cfainstitute.org](http://www.cfainstitute.org).*

**ITEM 3 | DISCIPLINARY INFORMATION**

John has no legal or disciplinary events to report.

**ITEM 4 | OTHER BUSINESS ACTIVITIES**

John is an Officer of Bridges Trust Company (a Nebraska chartered trust company). John does not receive additional economic benefit from any third party for the provision of advisory services.

**ITEM 5 | ADDITIONAL COMPENSATION**

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

**ITEM 6 | SUPERVISION**

The Firm supervises its investment adviser representatives' advisory activities according to various functional areas, appointing one or more individuals as designated supervisors for each area. The Firm monitors supervised persons' investment advice by reviewing client account investment parameters, allocations and trading activity, among other things. The Firm's Chief Executive Officer, Nick Wilwerding, is responsible for supervised persons' advisory activities on behalf of the Firm and can be reached at 402-397-4700.

July 29, 2024

**MATTHEW N. EGLSEDER, CFP®, RICP®**

Bridges Investment Management, Inc.  
13333 California Street Suite 500  
Omaha, NE 68154  
402.397.4700

This brochure supplement provides information about Matt N. Eglseder that supplements the Bridges Investment Management, Inc. brochure. You should have received a copy of that brochure. Please contact Bridges Investment Management, Inc.'s Chief Compliance Officer at 402.397.4700 if you did not receive Bridges Investment Management, Inc.'s brochure or if you have any questions about the contents of this supplement.

Additional information about Matthew N. 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**

Matthew N. Eglseder ("Matt") joined Bridges Investment Management as a Portfolio Analyst in February 2020 where he participates in the firm's Investment Committee and his primary responsibilities include Financial Planning and Investment Management. Matt was previously a Financial Advisor with RBC Capital Markets in December 2018 until joining Bridges. He began his investment industry career with TD Ameritrade from July 2017 to November 2018 where he served as a Financial Services Representative and New Client Specialist.

**Birthyear:** 1994

**Education:** Bachelor of Science in Business Administration - Creighton University

**Professional Designations:** Certified Financial Planner (CFP®)

*Certified Financial Planner (CFP®) 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).*

*Retirement Income Certified Professional (RICP®): RICP® certification is a specialized course of study through the American College of Financial Planning specializing in retirement planning with certificants gaining practical knowledge to build retirement income strategies for numerous client situations and income styles covering strategies for Social Security claiming, approaches to healthcare and long-term care costs, tools for estate and legacy planning, strategies for employee retirement plan savings, investments, and other products. Use of the designation requires adherence to membership requirements and 16 hours of continuing education credits every two years. RICP® certification requirements are to successfully complete the three required courses, agree to comply with The American College Code of Ethics and Procedures, and three years' experience in financial planning or a related profession. Additional information available at [www.theamericancollege.edu/](http://www.theamericancollege.edu/).*

**ITEM 3 | DISCIPLINARY INFORMATION**

Matt has no legal or disciplinary events to report.

**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 to clients.

**ITEM 6 | SUPERVISION**

The Firm supervises its investment adviser representatives' advisory activities according to various functional areas, appointing one or more individuals as designated supervisors for each area. The Firm monitors supervised persons' investment advice by reviewing client account investment parameters, allocations and trading activity, among other things. The Firm's Chief Executive Officer, Nick Wilwerding, is responsible for supervised persons' advisory activities on behalf of the Firm and can be reached at 402-397-4700.

July 29, 2024

**BRENDA L. ANDERSON**

Bridges Investment Management, Inc.  
13333 California Street Suite 500  
Omaha, NE 68154  
402.397.4700

This brochure supplement provides information about Brenda L. Anderson that supplements the Bridges Investment Management, Inc. brochure. You should have received a copy of that brochure. Please contact Bridges Investment Management, Inc.'s Chief Compliance Officer at 402.397.4700 if you did not receive Bridges Investment Management, Inc.'s brochure or if you have any questions about the contents of this supplement.

Additional information about Brenda L. 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 joined Bridges Investment Management in April 2020 where she works as a Client Service Manager. She previously worked in a Financial Client Services role with WealthPlan Partners from December 2019 to April 2020, an IRA Distributions and Asset Transfer Processing Manager with Securities America from September 2014 to August 2019. Brenda began her investment industry career in January 1999 with TD Ameritrade where she worked in various roles with increasing responsibility until August 2014.

**Birthyear:** 1969

**Education:** Associate Degree of Applied Sciences - Des Moines Area Community College

**ITEM 3 | DISCIPLINARY INFORMATION**

Brenda has no legal or disciplinary events to report.

**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 to clients.

**ITEM 6 | SUPERVISION**

The Firm supervises its investment adviser representatives' advisory activities according to various functional areas, appointing one or more individuals as designated supervisors for each area. The Firm monitors supervised persons' investment advice by reviewing client account investment parameters, allocations and trading activity, among other things. The Firm's Chief Executive Officer, Nick Wilwerding, is responsible for supervised persons' advisory activities on behalf of the Firm and can be reached at 402-397-4700.

January 2, 2025

**CONNOR W. F. PUGNO, CFA**

Bridges Investment Management, Inc.  
13333 California Street Suite 500  
Omaha, NE 68154  
402.397.4700

This brochure supplement provides information about Connor W. F. Pugno that supplements the Bridges Investment Management, Inc. brochure. You should have received a copy of that brochure. Please contact Bridges Investment Management, Inc.'s Chief Compliance Officer at 402.397.4700 if you did not receive Bridges Investment Management, Inc.'s brochure or if you have any questions about the contents of this supplement.

Additional information about Connor W. F. 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 W. F. Pugno started July 2017, with Westwood Holdings Group as an Investment Analyst transitioning to a similar role with Bridges Investment Management 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 and also serves as a portfolio manager to the Bridges Investment Fund (Symbol: BRGIX). Connor previously worked in Property Management with Union Pacific from May 2015 to May 2016 and joined the financial services industry in April 2016 as an Investment Analyst Intern with Dundee Venture Capital and in September 2016, with Mutual of Omaha.

**Birthyear:** 1995

**Education:** Bachelor of Science - Creighton University

**Professional Designations:** Chartered Financial Analyst®

*Chartered Financial Analyst® (CFA®) charterholders earn the right to use the CFA® designation by adhering to CFA Institute's membership and professional conduct standards, successfully completing the CFA Program's three levels (Approx. 900 hours of study), attaining 4 years professional work experience in the investment decision process as well as a bachelor's degree or equivalent education/experience, and fulfilling local CFA member society requirements. CFA® and Chartered Financial Analyst® are registered trademarks owned by CFA Institute with further information available at [www.cfainstitute.org](http://www.cfainstitute.org).*

**ITEM 3 | DISCIPLINARY INFORMATION**

Connor has no legal or disciplinary events to report.

**ITEM 4 | OTHER BUSINESS ACTIVITIES**

Connor is an Officer of Bridges Trust Company (a Nebraska chartered trust company) and volunteers as a Board Director for Circle Theatre Omaha. 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 to clients.

**ITEM 6 | SUPERVISION**

The Firm supervises its investment adviser representatives' advisory activities according to various functional areas, appointing one or more individuals as designated supervisors for each area. The Firm monitors supervised persons' investment advice by reviewing client account investment parameters, allocations and trading activity, among other things. The Firm's Chief Executive Officer, Nick Wilwerding, is responsible for supervised persons' advisory activities on behalf of the Firm and can be reached at 402-397-4700.

July 29, 2024

**SAMANTHA L. RATHJE, CFP®**

Bridges Investment Management, Inc.  
13333 California Street Suite 500  
Omaha, NE 68154  
402.397.4700

This brochure supplement provides information about Samantha Rathje that supplements the Bridges Investment Management, Inc. brochure. You should have received a copy of that brochure. Please contact Bridges Investment Management, Inc.'s Chief Compliance Officer at 402.397.4700 if you did not receive Bridges Investment Management, Inc.'s brochure or if you have any questions about the contents of this supplement.

Additional information about Samantha L. 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 joined Bridges Investment Management in April 2021 as a Client Service Manager and is currently a Portfolio Analyst after she was promoted in February 2024. She began working in Client Services and later as a Staff Accountant with Dana F. Cole & Co. LLP from December 2005 to November 2015. Samantha transitioned her career in November 2015 to Store Manager of Lincoln Mattress & Furniture Co. until joining Bridges.

**Birthyear:** 1982

**Education:** Bachelor of Science in Accounting - University of Nebraska Lincoln

**Professional Designations:** Certified Financial Planner (CFP®)

*Certified Financial Planner (CFP®) 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**

Samantha has no legal or disciplinary events to report.

**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 to clients.

**ITEM 6 | SUPERVISION**

The Firm supervises its investment adviser representatives' advisory activities according to various functional areas, appointing one or more individuals as designated supervisors for each area. The Firm monitors supervised persons' investment advice by reviewing client account investment parameters, allocations and trading activity, among other things. The Firm's Chief Executive Officer, Nick Wilwerding, is responsible for supervised persons' advisory activities on behalf of the Firm and can be reached at 402-397-4700.



July 29, 2024

**JILLIAN E. YLO, CFP®**

Bridges Investment Management, Inc.  
13333 California Street Suite 500  
Omaha, NE 68154  
402.397.4700

This brochure supplement provides information about Jillian E. Ylo that supplements the Bridges Investment Management, Inc. brochure. You should have received a copy of that brochure. Please contact Bridges Investment Management, Inc.'s Chief Compliance Officer at 402.397.4700 if you did not receive Bridges Investment Management, Inc.'s brochure or if you have any questions about the contents of this supplement.

Additional information about Jillian E. 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 started her career with Bridges Investment Management as a Portfolio Analyst in November 2022. She was previously with The Vanguard Group's Financial Advisor Development Program from June 2020 to November 2022. Prior to that, she was a College to Corporate Advice Intern with Vanguard from May 2019 to August 2019 and a Sales Intern at Sherwin Williams from May 2018 to March 2018. Jillian was a fulltime student at Purdue University from 2016 to 2022.

**Birthyear:** 1997

**Education:** Bachelor of Science emphasizing in Financial Counseling and Planning - Purdue University  
Bachelor of Science - Selling and Sales Management - Purdue University

**Professional Designations:** Certified Financial Planner (CFP®)

*Certified Financial Planner (CFP®) 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**

Jillian has no legal or disciplinary events to report.

**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 to clients.

**ITEM 6 | SUPERVISION**

The Firm supervises its investment adviser representatives' advisory activities according to various functional areas, appointing one or more individuals as designated supervisors for each area. The Firm monitors supervised persons' investment advice by reviewing client account investment parameters, allocations and trading activity, among other things. The Firm's Chief Executive Officer, Nick Wilwerding, is responsible for supervised persons' advisory activities on behalf of the Firm and can be reached at 402-397-4700.

July 29, 2024

**DANIEL M. PODPESKAR, CFA**

Bridges Investment Management, Inc.  
13333 California Street Suite 500  
Omaha, NE 68154  
402.397.4700

This brochure supplement provides information about Daniel M. Podpeskar that supplements the Bridges Investment Management, Inc. brochure. You should have received a copy of that brochure. Please contact Bridges Investment Management, Inc.'s Chief Compliance Officer at 402.397.4700 if you did not receive Bridges Investment Management, Inc.'s brochure or if you have any questions about the contents of this supplement.

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 Podpeskar ("Dan") is a Senior Research Analyst for Bridges Investment Management. Dan joined Bridges in April of 2019 as a Research Analyst. Additionally, Dan participates as a member of the firm's Investment Committee. 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 February 2018, where he served as an Investor Services Representative and Retail Trading Representative.

**Birthyear:** 1995

**Education:** Bachelor of Science in Business Administration - Creighton University

**Professional Designations:** Chartered Financial Analyst®

*Chartered Financial Analyst® (CFA®) charterholders earn the right to use the CFA® designation by adhering to CFA Institute's membership and professional conduct standards, successfully completing the CFA Program's three levels (Approx. 900 hours of study), attaining 4 years professional work experience in the investment decision process as well as a bachelor's degree or equivalent education/experience, and fulfilling local CFA member society requirements. CFA® and Chartered Financial Analyst® are registered trademarks owned by CFA Institute with further information available at [www.cfainstitute.org](http://www.cfainstitute.org).*

**ITEM 3 | DISCIPLINARY INFORMATION**

Dan has no legal or disciplinary events to report.

**ITEM 4 | OTHER BUSINESS ACTIVITIES**

Dan 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**

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

**ITEM 6 | SUPERVISION**

The Firm supervises its investment adviser representatives' advisory activities according to various functional areas, appointing one or more individuals as designated supervisors for each area. The Firm monitors supervised persons' investment advice by reviewing client account investment parameters, allocations and trading activity, among other things. The Firm's Chief Executive Officer, Nick Wilwerding, is responsible for supervised persons' advisory activities on behalf of the Firm and can be reached at 402-397-4700.

July 29, 2024

**ANDREW L. BLUM**

Bridges Investment Management, Inc.  
13333 California Street Suite 500  
Omaha, NE 68154  
402.397.4700

This brochure supplement provides information about Andrew L. Blum that supplements the Bridges Investment Management, Inc. brochure. You should have received a copy of that brochure. Please contact Bridges Investment Management, Inc.'s Chief Compliance Officer at 402.397.4700 if you did not receive Bridges Investment Management, Inc.'s brochure or if you have any questions about the contents of this supplement.

Additional information about Andrew L. 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 began his investment industry career with Bridges Investment Management in February of 2023 working as a Client Service Associate and subsequently earning a promotion to Portfolio Analyst in June 2024. Andrew worked in construction for Blum Brothers Construction from August 2014 to August 2022 and briefly was a Production Worker for Kawaski Motors Manufacturing starting in May 2022.

**Birthyear:** 1999

**Education:** Bachelor of Science in Financial Management - Northwest Missouri State University

**ITEM 3 | DISCIPLINARY INFORMATION**

Andrew has no legal or disciplinary events to report.

**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 to clients.

**ITEM 6 | SUPERVISION**

The Firm supervises its investment adviser representatives' advisory activities according to various functional areas, appointing one or more individuals as designated supervisors for each area. The Firm monitors supervised persons' investment advice by reviewing client account investment parameters, allocations and trading activity, among other things. The Firm's Chief Executive Officer, Nick Wilwerding, is responsible for supervised persons' advisory activities on behalf of the Firm and can be reached at 402-397-4700.

July 29, 2024

**CLAYTON COLE ANDERSON**

Bridges Investment Management, Inc.  
13333 California Street Suite 500  
Omaha, NE 68154  
402.397.4700

This brochure supplement provides information about Clayton Cole Anderson that supplements the Bridges Investment Management, Inc. brochure. You should have received a copy of that brochure. Please contact Bridges Investment Management, Inc.'s Chief Compliance Officer at 402.397.4700 if you did not receive Bridges Investment Management, Inc.'s brochure or if you have any questions about the contents of this supplement.

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") began his investment industry career with Bridges Investment Management, Inc. in February 2023 as a Client Service Associate and was promoted to Portfolio Analyst in September 2023. Prior to working in the investment industry, Cole worked as a Business Development Representative with Buildertrend from January to December 2020 and as a Sales Coach with Supportworks, Inc. from January 2021 to February 2023. He was also a student at Iowa State University from June 2014 to December 2019.

**Birthyear:** 1996

**Education:** Bachelor of Science in Marketing - Iowa State University  
Master of Science in Family Financial Planning - Iowa State University

**ITEM 3 | DISCIPLINARY INFORMATION**

Cole has no legal or disciplinary events to report.

**ITEM 4 | OTHER BUSINESS ACTIVITIES**

Cole is an Officer of Bridges Trust Company, a Nebraska chartered trust company under common control with Bridges Investment Management and is not actively engaged in any other investment-related 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 to clients.

**ITEM 6 | SUPERVISION**

The Firm supervises its investment adviser representatives' advisory activities according to various functional areas, appointing one or more individuals as designated supervisors for each area. The Firm monitors supervised persons' investment advice by reviewing client account investment parameters, allocations and trading activity, among other things. The Firm's Chief Executive Officer, Nick Wilwerding, is responsible for supervised persons' advisory activities on behalf of the Firm and can be reached at 402-397-4700.

July 29, 2024

**HALEY A. GILBERTSON**

Bridges Investment Management, Inc.  
13333 California Street Suite 500  
Omaha, NE 68154  
402.397.4700

This brochure supplement provides information about Haley A. Gilbertson that supplements the Bridges Investment Management, Inc. brochure. You should have received a copy of that brochure. Please contact Bridges Investment Management, Inc.'s Chief Compliance Officer at 402.397.4700 if you did not receive Bridges Investment Management, Inc.'s brochure or if you have any questions about the contents of this supplement.

Additional information about Haley A. 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 A. Gilbertson is a Portfolio Analyst at Bridges Investment Management. She began her investment industry career in June 2021 as a Research Analyst Intern for Bridges Investment Management and transitioned to a fulltime Research Analyst in June 2022. Haley attended Creighton University full-time from 2018-2022. Additionally, she passed level I and is a level II candidate in the Chartered Financial Analyst Institute's CFA program.

**Birthyear:** 2000

**Education:** Bachelor of Science in Finance and Business Intelligence and Analytics - Creighton University

**ITEM 3 | DISCIPLINARY INFORMATION**

Haley has no legal or disciplinary events to report.

**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 to clients.

**ITEM 6 | SUPERVISION**

The Firm supervises its investment adviser representatives' advisory activities according to various functional areas, appointing one or more individuals as designated supervisors for each area. The Firm monitors supervised persons' investment advice by reviewing client account investment parameters, allocations and trading activity, among other things. The Firm's Chief Executive Officer, Nick Wilwerding, is responsible for supervised persons' advisory activities on behalf of the Firm and can be reached at 402-397-4700.



July 29, 2024

**COLE J. MITCHELL**

Bridges Investment Management, Inc.  
13333 California Street Suite 500  
Omaha, NE 68154  
402.397.4700

This brochure supplement provides information about Cole J. Mitchell that supplements the Bridges Investment Management, Inc. brochure. You should have received a copy of that brochure. Please contact Bridges Investment Management, Inc.'s Chief Compliance Officer at 402.397.4700 if you did not receive Bridges Investment Management, Inc.'s brochure or if you have any questions about the contents of this supplement.

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

**ITEM 2 | EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE**

Cole J. Mitchell joined Bridges Investment Management in April of 2023 as a Trust Operations Analyst before moving into the Client Service Associate role in June of 2024. Cole served in a role at Robinhood in February 2021, where he served as a Customer Experience Representative and then an Advanced Services Representative in July 2022. He began his investment career with TD Ameritrade as an Intern from May 2019 and a Financial Services Representative from January 2020 to January 2021.

**Birthyear:** 1997

**Education:** Bachelor of Science in Business Administration - University of Nebraska-Lincoln

**ITEM 3 | DISCIPLINARY INFORMATION**

Cole has no legal or disciplinary events to report.

**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 to clients.

**ITEM 6 | SUPERVISION**

The Firm supervises its investment adviser representatives' advisory activities according to various functional areas, appointing one or more individuals as designated supervisors for each area. The Firm monitors supervised persons' investment advice by reviewing client account investment parameters, allocations and trading activity, among other things. The Firm's Chief Executive Officer, Nick Wilwerding, is responsible for supervised persons' advisory activities on behalf of the Firm and can be reached at 402-397-4700.

July 29, 2024

**BRYSON G. FREEBERG**

Bridges Investment Management, Inc.  
13333 California Street Suite 500  
Omaha, NE 68154  
402.397.4700

This brochure supplement provides information about Bryson G. Freeberg that supplements the Bridges Investment Management, Inc. brochure. You should have received a copy of that brochure. Please contact Bridges Investment Management, Inc.'s Chief Compliance Officer at 402.397.4700 if you did not receive Bridges Investment Management, Inc.'s brochure or if you have any questions about the contents of this supplement.

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

**ITEM 2 | EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE**

Bryson G. Freeberg began his investment industry career with Bridges Investment Management in April of 2024 as a Client Service Associate. Prior to working in the investment industry, Bryson worked in the worker's compensation insurance industry as a claims adjuster at Omaha National from January 2024 to April 2024, was an Office Runner with Cray Huff Law from December 2022 to January 2024 and held a position as Management Intern at K&B Transportation. From August of 2020 to December 2023, Bryson was a full-time student completing his degree at Morningside University.

**Birthyear:** 2001

**Education:** Bachelor of Arts in Business Administration and Political Science - Morningside University

**ITEM 3 | DISCIPLINARY INFORMATION**

Bryson has no legal or disciplinary events to report.

**ITEM 4 | OTHER BUSINESS ACTIVITIES**

Bryson 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**

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

**ITEM 6 | SUPERVISION**

The Firm supervises its investment adviser representatives' advisory activities according to various functional areas, appointing one or more individuals as designated supervisors for each area. The Firm monitors supervised persons' investment advice by reviewing client account investment parameters, allocations and trading activity, among other things. The Firm's Chief Executive Officer, Nick Wilwerding, is responsible for supervised persons' advisory activities on behalf of the Firm and can be reached at 402-397-4700.

September 5, 2024

**GRANT E. COLEMAN**

Bridges Investment Management, Inc.  
13333 California Street Suite 500  
Omaha, NE 68154  
402.397.4700

This brochure supplement provides information about Grant E. Coleman that supplements the Bridges Investment Management, Inc. brochure. You should have received a copy of that brochure. Please contact Bridges Investment Management, Inc.'s Chief Compliance Officer at 402.397.4700 if you did not receive Bridges Investment Management, Inc.'s brochure or if you have any questions about the contents of this supplement.

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

**ITEM 2 | EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE**

Grant E. Coleman began his investment industry career as a Financial Services Representative with TD Ameritrade in February 2022 and became a Registered Representative in May 2024. Grant joined Bridges Investment Management in June 2024 as a Client Service Associate. Prior to working in the investment industry, Grant attended the University of Nebraska at Omaha as a full-time student from August 2021 to May 2024.

**Birthyear:** 2002

**Education:** Bachelor of Science in Business Administration - University of Nebraska - Omaha

**ITEM 3 | DISCIPLINARY INFORMATION**

Grant has no legal or disciplinary events to report.

**ITEM 4 | OTHER BUSINESS ACTIVITIES**

Grant 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**

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

**ITEM 6 | SUPERVISION**

The Firm supervises its investment adviser representatives' advisory activities according to various functional areas, appointing one or more individuals as designated supervisors for each area. The Firm monitors supervised persons' investment advice by reviewing client account investment parameters, allocations and trading activity, among other things. The Firm's Chief Executive Officer, Nick Wilwerding, is responsible for supervised persons' advisory activities on behalf of the Firm and can be reached at 402-397-4700.

August 16, 2024

**BRANDON REED, CFA**

Bridges Investment Management, Inc.  
13333 California Street Suite 500  
Omaha, NE 68154  
402.397.4700

This brochure supplement provides information about Brandon Reed that supplements the Bridges Investment Management, Inc. brochure. You should have received a copy of that brochure. Please contact Bridges Investment Management, Inc.'s Chief Compliance Officer at 402.397.4700 if you did not receive Bridges Investment Management, Inc.'s brochure or if you have any questions about the contents of this supplement.

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

**ITEM 2 | EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE**

Brandon Reed is a Senior Portfolio Manager with Bridges Investment Management, Inc. ("BIM") and joined the firm in August 2024. Prior to joining BIM, Brandon acquired over ten years' financial services experience in positions of increasing responsibility. More specifically, Brandon served as a Senior Fundamental Analyst with FS Investments from July 2021 to May 2024, Director - Wealth Management with Hightower Advisors LLC from March 2021 to July 2021, Analyst with Mitchell Capital Management Company from May 2016 to December 2020, and Analyst with Zemenick & Walker Inc. from January 2014 to May 2016 after graduating college in January 2014.

**Birthyear:** 1990

**Education:** Bachelor of Science with a concentration in Finance - Saint Louis University

**Professional Designations:** Chartered Financial Analyst®

*Chartered Financial Analyst® (CFA®) charterholders earn the right to use the CFA® designation by adhering to CFA Institute's membership and professional conduct standards, successfully completing the CFA Program's three levels (Approx. 900 hours of study), attaining 4 years professional work experience in the investment decision process as well as a bachelor's degree or equivalent education/experience, and fulfilling local CFA member society requirements. CFA® and Chartered Financial Analyst® are registered trademarks owned by CFA Institute with further information available at [www.cfainstitute.org](http://www.cfainstitute.org).*

**ITEM 3 | DISCIPLINARY INFORMATION**

Brandon has no legal or disciplinary events to report.

**ITEM 4 | OTHER BUSINESS ACTIVITIES**

Brandon 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**

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

**ITEM 6 | SUPERVISION**

The Firm supervises its investment adviser representatives' advisory activities according to various functional areas, appointing one or more individuals as designated supervisors for each area. The Firm monitors supervised persons' investment advice by reviewing client account investment parameters, allocations and trading activity, among other things. The Firm's Chief Executive Officer, Nick Wilwerding, is responsible for supervised persons' advisory activities on behalf of the Firm and can be reached at 402-397-4700.

September 5, 2024

**BRETT BECKER, CFA**

Bridges Investment Management, Inc.  
13333 California Street Suite 500  
Omaha, NE 68154  
402.397.4700

This brochure supplement provides information about Brett Becker that supplements the Bridges Investment Management, Inc. brochure. You should have received a copy of that brochure. Please contact Bridges Investment Management, Inc.'s Chief Compliance Officer at 402.397.4700 if you did not receive Bridges Investment Management, Inc.'s brochure or if you have any questions about the contents of this supplement.

Additional information about Brett Becker 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 Becker is a Portfolio Manager with Bridges Investment Management, Inc. and joined the firm in August 2024 with over ten years' financial services experience. More specifically, Brett served as a Financial Advisor at Stifel Nicolaus & Company from April 2024 to August 2024 and as a Financial Consultant at Wells Fargo Advisors from August 2019 to April 2024 with both positions including portfolio management responsibilities. Brett also served as a Trader with Insight Securities from March 2015 to August 2019, and as an advisor with Waddell & Reed from March 2014 to February 2025 where his career in financial services began after college graduation.

**Birthyear:** 1992

**Education:** Bachelor of Science with a concentration in Finance - University of Nebraska - Lincoln

**Professional Designations:** Chartered Financial Analyst®, Chartered Alternative Investment Analyst®

*Chartered Financial Analyst® (CFA®) charterholders earn the right to use the CFA® designation by adhering to CFA Institute's membership and professional conduct standards, successfully completing the CFA Program's three levels (Approx. 900 hours of study), attaining 4 years professional work experience in the investment decision process as well as a bachelor's degree or equivalent education/experience, and fulfilling local CFA member society requirements. CFA® and Chartered Financial Analyst® are registered trademarks owned by CFA Institute with further information available at [www.cfainstitute.org](http://www.cfainstitute.org).*

*Chartered Alternative Investment Analyst® (CAIA®) charterholders earn the right to use the CAIA designation by meeting and adhering to the Chartered Alternative Investment Analyst Association's membership standards, successfully completing the CAIA Program's two levels (Approx. 200 hours of study), attaining professional experience in a full-time employment capacity within the bank regulatory, banking, financial, or related fields and a U.S. bachelor's degree (or equivalent) or four-years of qualifying professional experience. CAIA® and Chartered Alternative Investment Analyst® are registered trademarks owned by the Chartered Alternative Investment Analyst Association with further information available at [www.caia.org](http://www.caia.org).*

**ITEM 3 | DISCIPLINARY INFORMATION**

Brett has no legal or disciplinary events to report.

**ITEM 4 | OTHER BUSINESS ACTIVITIES**

Brett 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**

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

**ITEM 6 | SUPERVISION**

The Firm supervises its investment adviser representatives' advisory activities according to various functional areas, appointing one or more individuals as designated supervisors for each area. The Firm monitors supervised persons' investment advice by reviewing client account investment parameters, allocations and trading activity, among other things. The Firm's Chief Executive Officer, Nick Wilwerding, is responsible for supervised persons' advisory activities on behalf of the Firm and can be reached at 402-397-4700.

November 15, 2024

**RACHEL A. BULLERJAHN**

Bridges Investment Management, Inc.  
13333 California Street Suite 500  
Omaha, NE 68154  
402.397.4700

This brochure supplement provides information about Rachel A. Bullerjahn that supplements the Bridges Investment Management, Inc. brochure. You should have received a copy of that brochure. Please contact Bridges Investment Management, Inc.'s Chief Compliance Officer at 402.397.4700 if you did not receive Bridges Investment Management, Inc.'s brochure or if you have any questions about the contents of this supplement.

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

**ITEM 2 | EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE**

Rachel A. Bullerjahn joined Bridges Investment Management in July 2024 as a Client Services Manager. Prior to joining the Firm, Rachel obtained a Bachelor of Science in Business Administration emphasizing in Finance and Business Analytics in May 2024 and is currently pursuing a Master of Investment Management & Financial Analysis outside of business hours. Rachel gained financial services experience as a Financial Planning Intern at Cornerstone Wealth Advisers during the summer of 2022, Business Intelligence Analyst Intern during the summer of 2023 at Gallup where she progressed to a Financial Administrator Intern position from August 2023 through July 2024.

**Birthyear:** 2001

**Education:** Bachelor of Science in Business Administration - Creighton University

**ITEM 3 | DISCIPLINARY INFORMATION**

Rachel has no legal or disciplinary events to report.

**ITEM 4 | OTHER BUSINESS ACTIVITIES**

Rachel 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.

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**ITEM 5 | ADDITIONAL COMPENSATION**

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

**ITEM 6 | SUPERVISION**

The Firm supervises its investment adviser representatives' advisory activities according to various functional areas, appointing one or more individuals as designated supervisors for each area. The Firm monitors supervised persons' investment advice by reviewing client account investment parameters, allocations and trading activity, among other things. The Firm's Chief Executive Officer, Nick Wilwerding, is responsible for supervised persons' advisory activities on behalf of the Firm and can be reached at 402-397-4700.