

Item 1: Cover Page

ADV Part 2B
Brochure Supplement



Colman Knight Advisory Group, LLC

530 Great Road
Acton, MA 01720

March 30, 2026

978-371-2015

www.colmanknight.com

This brochure supplement provides information about **David Kwasi Manteau** that supplements the information provided in the Colman Knight Advisory Group, LLC (“Colman Knight”) brochure. You should have received a copy of that brochure. Please contact David Manteau, Chief Compliance Officer at 978-371-2015 or by email at david@colmanknight.com if you did not receive the brochure or if you have any questions about the content of this supplement.

Additional information about **David Kwasi Manteau** is also available on the SEC’s website at www.adviserinfo.sec.gov via his personal Web CRD number. The searchable IARD/CRD number for Colman Knight Advisory Group, LLC is 119696.

David Kwasi Manteau, CFA, CFP®

Personal CRD #5050202

Item 2: Education Background and Business Experience

- Year of birth: 1978

Education

- Johnson & Wales University, MBA Finance (2005)
- University of Ghana, BA Political Science (2001)

Recent Business Background:

- Colman Knight Advisory Group, LLC – Chief Compliance Officer, Financial Planner & Investment Manager - (01/2025 to Present)
- Boston University, Center for Professional Education – Subject Matter Expert/Adjunct Professor (03/2024 – Present)
- Colman Knight Advisory Group, LLC - Financial Planner & Investment Manager - (10/2022 to 01/2025)
- Prudential — Financial Planner - 2021–2022
- Independent — Investment Advisor - 2020–2021
- Advice Systems — Research Analyst - 2019–2020
- MassMutual — Financial Planning Consultant - 2013–2019

Designations

Certified Financial Planner (CFP®) Accreditation (2009)

I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER® professional or a CFP® professional, and I may use these and the other certification marks (the “CFP Board Certification Marks”) that Certified Financial Planner Board of Standards Center for Financial Planning, Inc. has licensed to CFP Board in the United States. The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at www.cfp.net.

CFP® professionals have met CFP Board’s high standards for education, examination, experience, and ethics. To become a CFP® professional, an individual must fulfill the following requirements:

- **Education** – Earn a bachelor’s degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials. CFP Board implemented the bachelor’s degree or higher requirement in 2007 and the financial planning development capstone course requirement in March 2012. Therefore, a CFP® professional who first became certified before those dates may not have earned a bachelor’s or higher degree or completed a financial planning development capstone course.

- **Examination** – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual’s ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.

- **Experience** – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.

- **Ethics** – Satisfy the Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement and agree to be bound by CFP Board’s Code of Ethics and Standards of Conduct (“Code and Standards”), which sets forth the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements to remain certified and maintain the right to continue to use the CFP Board Certification Marks:

- *Ethics* – Commit to complying with CFP Board’s Code and Standards. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional’s services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.

- *Continuing Education* – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

Chartered Financial Analyst (CFA Charter) (2018)

- The Chartered Financial Analyst (CFA) charter is a globally respected investment credential established in 1962 and awarded by the CFA Institute. To earn the CFA charter, candidates must: 1) Pass three sequential, six-hour examinations; 2) Have at least four years of qualified professional investment experience; 3) Join the CFA Institute as members; and 4) Commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct. To learn more about the CFA charter, visit www.cfainstitute.org

Item 3: Disciplinary Information

- None

Item 4: Other Business Activities

- David Manteau is a Subject Matter Expert/Adjunct Professor at Boston University Center of Professional Education. This outside business activity takes up less than 10 percent of his time.

Item 5: Additional Compensation

- None

Item 6: Supervision

David Manteau is the CCO for Colman Knight Advisory Group, LLC. Complete adherence to the Firm’s compliance manual and the Code of Ethics is required by all employees. As noted below, each aspect of David’s work is periodically audited to ensure compliance.

This includes, but is not limited to, the following items:

- Client communications including e-mails, internal notes and memos
- Financial Plans, Investment Policy Statements and client recommendations
- Portfolio reports and trade records
- Client meetings and on-site visits
- Cash movements from custodian including deposits and withdrawals
- Pre-clearance of personal securities transactions

Supervisor’s contact information:

David Manteau, CCO ♦ (978) 371-2015 ♦ david@colmanknight.com

Item 1: Cover Page

ADV Part 2B
Brochure Supplement



Colman Knight Advisory Group, LLC

530 Great Road
Acton, MA 01720

March 30, 2026

978-371-2015

www.colmanknight.com

This brochure supplement provides information about **Marc Gerald Berman** that supplements the information provided in the Colman Knight Advisory Group, LLC (“Colman Knight”) brochure. You should have received a copy of that brochure. Please contact David Manteau, Chief Compliance Officer at 978-371-2015 or by email at david@colmanknight.com if you did not receive the brochure or if you have any questions about the content of this supplement.

Additional information about Marc Gerald Berman is also available on the SEC’s website at www.adviserinfo.sec.gov via his personal Web CRD number. The searchable IARD/CRD number for Colman Knight Advisory Group, LLC is 119696.

Marc Gerald Berman, CFP®

Personal CRD#3088816

Item 2: Education Background and Business Experience

- Year of birth: 1943

Education

- Boston University, Diploma in Financial Planning (2001)
- Northeastern University, MS Industrial Engineer (1968)
- Northeastern University, BS Industrial Engineer (1966)

Recent Business Background:

- Colman Knight Advisory Group, LLC - Financial Planner & Investment Manager - (09/1999 to Present)

Designations

Certified Financial Planner (CFP®) Accreditation (2001)

I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER® professional or a CFP® professional, and I may use these and the other certification marks (the "CFP Board Certification Marks") that Certified Financial Planner Board of Standards Center for Financial Planning, Inc. has licensed to CFP Board in the United States. The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at www.cfp.net.

CFP® professionals have met CFP Board's high standards for education, examination, experience, and ethics. To become a CFP® professional, an individual must fulfill the following requirements:

- *Education* – Earn a bachelor's degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials. CFP Board implemented the bachelor's degree or higher requirement in 2007 and the financial planning development capstone course requirement in March 2012. Therefore, a CFP® professional who first became certified before those dates may not have earned a bachelor's or higher degree or completed a financial planning development capstone course.

- *Examination* – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual's ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.

- *Experience* – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.

- *Ethics* – Satisfy the Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement and agree to be bound by CFP Board's Code of Ethics and Standards of Conduct ("Code and Standards"), which sets forth the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements to remain certified and maintain the right to continue to use the CFP Board Certification Marks:

- *Ethics* – Commit to complying with CFP Board's Code and Standards. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best

interests of the client, at all times when providing financial advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.

- *Continuing Education* – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

Item 3: Disciplinary Information

- None

Item 4: Other Business Activities

- None

Item 5: Additional Compensation

- None

Item 6: Supervision

Marc Berman is a Financial Planner & Investment Manager for Colman Knight Advisory Group, LLC. His compliance-related activities are supervised by David Manteau, Chief Compliance Officer (CCO). Complete adherence to the Firm's compliance manual and the Code of Ethics is required by all employees. As noted below, each aspect of Marc's work is periodically audited by the CCO to ensure compliance.

This includes, but is not limited to, the following items:

- Client communications including e-mails, internal notes and memos
- Financial Plans, Investment Policy Statements and client recommendations
- Portfolio reports and trade records
- Client meetings and on-site visits
- Cash movements from custodian including deposits and withdrawals
- Pre-clearance of personal securities transactions

Supervisor's contact information:

David Manteau, CCO ♦ (978)371-2015 ♦ david@colmanknight.com

Item 1: Cover Page

ADV Part 2B
Brochure Supplement



Colman Knight Advisory Group, LLC
530 Great Road
Acton, MA 01720

March 30, 2026

978-371-2015

www.colmanknight.com

This brochure supplement provides information about **Richard Keith Colman, Esq.** that supplements the information provided in the Colman Knight Advisory Group, LLC (“Colman Knight”) brochure. You should have received a copy of that brochure. Please contact David Manteau, Chief Compliance Officer at 978-371-2015 or by email at david@colmanknight.com if you did not receive the brochure or if you have any questions about the content of this supplement.

Additional information about Richard Keith Colman, Esq. is also available on the SEC’s website at www.adviserinfo.sec.gov via his personal Web CRD number. The searchable IARD/CRD number for Colman Knight Advisory Group, LLC is 119696.

Richard Keith Colman, Esq.

Personal CRD# 4624978

Item 2: Education Background and Business Experience

- Year of birth: 1956

Education & Professional Designation:

- Boston University, Juris Doctor (1981)
- Cornell University, BA Government (1978)
- Admission to Bars (MA, NY) (1981)

Recent Business Background:

- Colman Knight Advisory Group, LLC – Managing Member (01/2025 to Present)
- Colman Knight Advisory Group, LLC – CCO, and Managing Member (09/1988 to 01/2025)

Item 3: Disciplinary Information

- None

Item 4: Other Business Activities

Mr. Colman is a licensed practicing attorney admitted to the Bars of the States of Massachusetts and New York. Mr. Colman is not actively engaged in the practice of law. He does not operate a law firm and does not receive compensation related to legal services. No portion of the financial plan or any other services rendered by Colman Knight to its clients should be interpreted as legal advice. Rather, clients should defer to the advice of their own attorney.

Item 5: Additional Compensation

- None

Item 6: Supervision

Richard Colman is a Managing Member of Colman Knight Advisory Group, LLC. His compliance-related activities are supervised by David Manteau, Chief Compliance Officer (CCO). Complete adherence to the Firm's compliance manual and the Code of Ethics is required by all employees. As noted below, each aspect of Rich's work is periodically audited by the CCO to ensure compliance.

This includes, but is not limited to, the following items:

- Client communications including e-mails, internal notes and memos
- Financial Plans, Investment Policy Statements and client recommendations
- Portfolio reports and trade records
- Client meetings and on-site visits
- Cash movements from custodian including deposits and withdrawals
- Pre-clearance of personal securities transactions

Supervisor's contact information:

David Manteau, CCO ♦ (978)371-2015 ♦ david@colmanknight.com

Item 1: Cover Page

ADV Part 2B
Brochure Supplement



Colman Knight Advisory Group, LLC

530 Great Road
Acton, MA 01720

March 30, 2026

978-371-2015

www.colmanknight.com

This brochure supplement provides information about **Michelle Lynn Contois** that supplements the information provided in the Colman Knight Advisory Group, LLC (“Colman Knight”) brochure. You should have received a copy of that brochure. Please contact David Manteau, Chief Compliance Officer at 978-371-2015 or by email at david@colmanknight.com if you did not receive the brochure or if you have any questions about the content of this supplement.

Additional information about Michelle Lynn Contois is also available on the SEC’s website at www.adviserinfo.sec.gov via her personal Web CRD number. The searchable IARD/CRD number for Colman Knight Advisory Group, LLC is 119696.

Michelle Lynn Contois, MBA

Personal CRD #3211723

Item 2: Education Background and Business Experience

- Year of birth: 1973

Education & Professional Designations:

- New York Institute of Technology, MBA/Accounting (August 2008)
- The University of Alabama, B.S. Commerce and Business Administration (May 1997)

Recent Business Background:

- Colman Knight Advisory Group, LLC – Associate Financial Planner – August 2024 – Present
- Cambridge Investment Research, LLC – Investment Adviser – June 2022 – July 2024
- Bartlett Wealth Management, Financial Services Practice Manager – October 2020 – May 2022
- GFA Federal Credit Union, Concierge Banker – July 2019 – October 2020
- GFA Federal Credit Union, Member Resource Analyst – August 2013 – July 2019

Item 3: Disciplinary Information

- None

Item 4: Other Business Activities

- None

Item 5: Additional Compensation

- None

Item 6: Supervision

Michelle Lynn Contois is a Financial Planner for Colman Knight Advisory Group, LLC. Her compliance-related activities are supervised by David Manteau, Chief Compliance Officer (CCO). Complete adherence to the Firm's compliance manual and the Code of Ethics is required by all employees. As noted below, each aspect of Michelle's work is periodically audited by the CCO to ensure compliance.

This includes, but is not limited to, the following items:

- Client communications including e-mails, internal notes and memos
- Financial Plans, Investment Policy Statements and client recommendations
- Portfolio reports and trade records
- Client meetings and on-site visits
- Cash movements from custodian including deposits and withdrawals
- Pre-clearance of personal securities transactions

Supervisor's contact information:

David Manteau, CCO ♦ (978)371-2015 ♦ david@colmanknight.com



Item 1: Cover Page

**ADV Part 2B
Brochure Supplement**



Colman Knight Advisory Group, LLC

530 Great Road
Acton, MA 01720

March 30, 2026

978-371-2015

www.colmanknight.com

This brochure supplement provides information about **Joseph James Knight Colman** that supplements the information provided in the Colman Knight Advisory Group, LLC ("Colman Knight") brochure. You should have received a copy of that brochure. Please contact David Manteau, Chief Compliance Officer at 978-371-2015 or by email at david@colmanknight.com if you did not receive the brochure or if you have any questions about the content of this supplement.

Additional information about Joseph James Knight Colman is also available on the SEC's website at www.adviserinfo.sec.gov via his personal Web CRD number. The searchable IARD/CRD number for Colman Knight Advisory Group, LLC is 119696.

Joseph James Knight Colman, CFP®

Personal CRD# 7075939

Item 2: Education Background and Business Experience

- Year of birth: 1995

Education

- Kenyon College, BA Economics and Political Science (2017)

Recent Business Background:

- Colman Knight Advisory Group, LLC - Financial Planner - (07/1999 to Present)
- JP Morgan – Business Analyst, 06/2017 – 07/2019

Designations

Certified Financial Planner (CFP®) Accreditation (2021)

I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER® professional or a CFP® professional, and I may use these and the other certification marks (the “CFP Board Certification Marks”) that Certified Financial Planner Board of Standards Center for Financial Planning, Inc. has licensed to CFP Board in the United States. The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at www.cfp.net.

CFP® professionals have met CFP Board’s high standards for education, examination, experience, and ethics. To become a CFP® professional, an individual must fulfill the following requirements:

- *Education* – Earn a bachelor’s degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirements through other qualifying credentials. CFP Board implemented the bachelor’s degree or higher requirement in 2007 and the financial planning development capstone course requirement in March 2012. Therefore, a CFP® professional who first became certified before those dates may not have earned a bachelor’s or higher degree or completed a financial planning development capstone course.

- *Examination* – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual’s ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.

- *Experience* – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.

- *Ethics* – Satisfy the Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement and agree to be bound by CFP Board’s Code of Ethics and Standards of Conduct (“Code and Standards”), which sets forth the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements to remain certified and maintain the right to continue to use the CFP Board Certification Marks:

- *Ethics* – Commit to complying with CFP Board’s Code and Standards. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning. CFP Board may

sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.

- *Continuing Education* – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

Item 3: Disciplinary Information

- None

Item 4: Other Business Activities

- None

Item 5: Additional Compensation

- None

Item 6: Supervision

Joseph James Knight Colman is a Managing Member of Colman Knight Advisory Group, LLC. His compliance-related activities are supervised by David Manteau, Chief Compliance Officer (CCO). Complete adherence to the Firm's compliance manual and the Code of Ethics is required by all employees. As noted below, each aspect of Knight's work is periodically audited by the CCO to ensure compliance.

This includes, but is not limited to, the following items:

- Client communications including e-mails, internal notes and memos
- Financial Plans, Investment Policy Statements and client recommendations
- Portfolio reports and trade records
- Client meetings and on-site visits
- Cash movements from custodian including deposits and withdrawals
- Pre-clearance of personal securities transactions

Supervisor's contact information:

David Manteau, CCO ♦ (978)371-2015 ♦ david@colmanknight.com