



**MOUNTAIN CAPITAL**  
INVESTMENT ADVISORS, INC

**Mountain Capital Investment Advisors, Inc.**  
**FORM ADV Part 2B**

**Brochure Supplement**

March 2025  
**Mountain Capital Investment Advisors, Inc.**

**Brandt Burns, Michelle Burns, Narvel (Isaia) Casas, CFP®  
John (Jay) Rockeman, Jordan Tarry, Adam Allgaier,  
Michael Pollard, Conner Murray, John (Jack) Strunc, CFP®**  
12235 Pecos St, Suite 100  
Westminster, CO 80234  
720-500-0050

**Karl Spurzem, CFA**  
73 Lakeside Dr  
Corte Madera, CA 94925  
720-500-0057

**Brian Quint**  
500 N Brand Blvd #2000  
Glendale, CA 91203  
720-500-0063

**Parker Balstad**  
7115 61<sup>st</sup> Alcove S  
Cottage Grove, MN 55016  
701-361-9435

**Ryan Buffone**  
1033 South Racine Unit 3NR  
Chicago, IL 60607  
312-399-8734

1. This brochure supplement provides information about the above listed individuals that supplements the brochure for Mountain Capital Investment Advisors Inc (MCIA). You should have received a copy of that brochure. Please contact Brian Quint at 720-500-0050 if you did not receive the MCIA brochure, or if you have any questions about the contents of this supplement. The information in this brochure has not been approved or verified by the United States Securities and Exchange Commission or by any state securities authority.

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

## **Mr. Brandt Burns**

### **1. Educational Background and Business Experience**

**Brandt Burns** - Born 1975

MBA, Roosevelt University, 2003  
BS, Oklahoma State University, 2000.

Prior to founding MCIA in 2011, Brandt worked for Morgan Stanley Smith Barney as a financial advisor from 2003.

Previously, Brandt was a pilot with Atlantic Coast Airlines from 2000 to 2005 and a chief pilot and flight instructor with Sunshine Aviation from 1998 to 2000.

Brandt served in the United States Marine Corps from 1993 to 1998.

### **2. Disciplinary Information**

Brandt Burns has no disciplinary history to disclose.

### **3. Other Business Activities**

Brandt Burns is not engaged in any other investment-related business activity, or any other business activity representing a substantial amount of Mr. Burns' time or income.

### **4. Additional Compensation**

No one who is not a client provides an economic benefit to Brandt Burns for providing advisory services.

Please refer to the MCIA brochure for a discussion of economic benefits that MCIA receives in connection to its business relationship with Schwab Advisor Services and Fidelity/National Financial Services.

### **5. Supervision**

Brandt Burns' advisory activities are supervised by Isaia Casas.

Isaia Casas is Manager of MCIA. As such, Mr. Casas is responsible for monitoring client portfolios for investment objectives and other supervisory reviews.

## **Ms. Michelle Burns**

### **1. Educational Background and Business Experience**

**Michelle Burns** - Born 1977

MBA, Roosevelt University, 2003  
BS, Oklahoma State University, 1999.

Prior to joining MCIA in 2017, Michelle worked for United Airlines in numerous roles dating to April 2000.

### **2. Disciplinary Information**

Michelle Burns has no disciplinary history to disclose.

### **3. Other Business Activities**

Michelle Burns is engaged in career consulting for pilots through Mountain Capital Consulting, LLC. Michelle also is engaged in income tax preparation through Mountain Capital CPAs, an affiliate of MCIA. Clients of affiliates may or may not be clients of MCIA's investment advisory practice.

### **4. Additional Compensation**

No one who is not a client provides an economic benefit to Michelle Burns for providing investment advisory services.

Please refer to the MCIA brochure for a discussion of economic benefits that MCIA receives in connection to its business relationship with Schwab Advisor Services and Fidelity/National Financial Services.

### **5. Supervision**

Michelle Burns' advisory activities are supervised by Isaia Casas.

Isaia Casas is Manager of MCIA. As such, Mr. Casas is responsible for monitoring client portfolios for investment objectives and other supervisory reviews.

**Mr. Narvel (Isaia) Casas, CFP®**

## **1. Educational Background and Business Experience**

**Isaia Casas** - Born 1998

University of Nebraska – Lincoln 2020

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Prior to joining MCIA in 2020, Isaia was a student and worked as an Intern for MCIA.

## **2. Disciplinary Information**

Isaia Casas has no disciplinary history to disclose.

## **3. Other Business Activities**

Isaia Casas is not engaged in any other investment-related business activity, or any other business activity representing a substantial amount of Mr. Casas' time or income.

## **4. Additional Compensation**

No one who is not a client provides an economic benefit to Isaia Casas for providing advisory services.

Please refer to the MCIA brochure for a discussion of economic benefits that MCIA receives in connection to its business relationship with Schwab Advisor Services and Fidelity/National Financial Services.

## **5. Supervision**

Isaia Casas is Manager of MCIA. As such, Mr. Casas is responsible for monitoring client portfolios for investment objectives and other supervisory reviews.

Isaia Casas is responsible for self-supervision.

## **Mr. John (Jay) Rockeman**

### **1. Educational Background and Business Experience**

**Jay Rockeman** - Born 1971

University of Colorado – Leeds school of Business 1992

Prior to joining MCIA in 2020, Jay has been an Air Transport Pilot for Frontier Airlines since 2001 and remains active.

Prior, Jay was an owner/member of Leading Edge Mortgage, LLC from 2003-2007.

Previously, Jay was a broker for World Group Securities, Inc. from 2000-2005.

Previously, Jay was a VP of new store development for Wild Oats markets, Inc. 1995-1999.

### **2. Disciplinary Information**

Jay Rockeman has no disciplinary history to disclose.

### **3. Other Business Activities**

Jay Rockeman is not engaged in any other investment-related business activity. Employment as an Air Transport Pilot for Frontier Airlines does represent a substantial amount of Mr. Rockeman's time and income.

### **4. Additional Compensation**

No one who is not a client provides an economic benefit to Jay Rockeman for providing advisory services.

Please refer to the MCIA brochure for a discussion of economic benefits that MCIA receives in connection to its business relationship with Schwab Advisor Services and Fidelity/National Financial Services.

### **5. Supervision**

Jay Rockeman's advisory activities are supervised by Isaia Casas.

Isaia Casas is Manager of MCIA. As such, Mr. Casas is responsible for monitoring client portfolios for investment objectives and other supervisory reviews.

## **Mr. Karl Spurzem, CFA**

### **1. Educational Background and Business Experience**

**Karl Spurzem** - Born 1959

University of California – Berkeley 1977-1981 BA Social Science

Northwestern University – JL Kellogg Graduate School of Management 1986-1988  
Concentration in Finance and Marketing

Chartered Financial Analyst – CFA Institute

Prior to joining MCIA in 2017, Mr. Spurzem’s responsibilities included institutional research sales with Guggenheim Partners as well as work in private equity marketing and analysis for Precipio Health Strategies.

### **2. Disciplinary Information**

Karl Spurzem has no disciplinary history to disclose.

### **3. Other Business Activities**

Karl Spurzem is not engaged in any other investment-related business activity, or any other business activity representing a substantial amount of Mr. Spurzem’s time or income.

### **4. Additional Compensation**

No one who is not a client provides an economic benefit to Karl Spurzem for providing advisory services.

Please refer to the MCIA brochure for a discussion of economic benefits that MCIA receives in connection to its business relationship with Schwab Advisor Services and Fidelity/National Financial Services.

### **5. Supervision**

Karl Spurzem’s advisory activities are supervised by Isaia Casas.

Isaia Casas is Manager of MCIA. As such, Mr. Casas is responsible for monitoring client portfolios for investment objectives and other supervisory reviews.

## **Mr. Jordan Tarry**

### **1. Educational Background and Business Experience**

**Jordan Tarry** - Born 1980

Cornell University – General Studies, 2002

Prior, Jordan was VP at Cantor Fitzgerald 2015-2017.

Previously Jordan was VP at International Strategy & Investment Group, LLC 2007-2015.

Previously, Jordan was Associate Managing Director at Morgan Keegan & Company 2003-2007.

### **2. Disciplinary Information**

Jordan Tarry has no disciplinary history to disclose.

### **3. Other Business Activities**

Jordan Tarry is not engaged in any other investment-related business activity, or any other business activity representing a substantial amount of Mr. Tarry's time or income.

### **4. Additional Compensation**

No one who is not a client provides an economic benefit to Jordan Tarry for providing advisory services.

Please refer to the MCIA brochure for a discussion of economic benefits that MCIA receives in connection to its business relationship with Schwab Advisor Services and Fidelity/National Financial Services.

### **5. Supervision**

Jordan Tarry's advisory activities are supervised by Isaia Casas.

Isaia Casas is Manager of MCIA. As such, Mr. Casas is responsible for monitoring client portfolios for investment objectives and other supervisory reviews.



## **Mr. Brian Quint**

### **1. Educational Background and Business Experience**

**Brian Quint** - Born 1983

B.A. in Technical Journalism, concentration in TV News and Video Communication  
Colorado State University, 2005

Prior to joining MCIA, Brian worked in Food & Beverage at Ace Hotel 2013 to 2020.

Previously, Brian was Beverage Director at The Hungry Cat 2010-2012.

Previously, Brian was a freelance Television and Film Production assistant 2006-2011.

### **2. Disciplinary Information**

Brian Quint has no disciplinary history to disclose.

### **3. Other Business Activities**

Brian Quint is not engaged in any other investment-related business activity.

### **4. Additional Compensation**

No one who is not a client provides an economic benefit to Brian Quint for providing advisory services.

Please refer to the MCIA brochure for a discussion of economic benefits that MCIA receives in connection to its business relationship with Schwab Advisor Services and Fidelity/National Financial Services.

### **5. Supervision**

Brian Quint's advisory activities are supervised by Isaia Casas.

Isaia Casas is Manager of MCIA. As such, Mr. Casas is responsible for monitoring client portfolios for investment objectives and other supervisory reviews.

## **Mr. Adam Allgaier**

### **1. Educational Background and Business Experience**

**Adam Allgaier** – Born 1993

Embry Riddle Aeronautical University – Aeronautical Science 2015

Prior to joining MCIA in 2020, Adam has been in Air Transport Pilot for United Airlines and remains active.

Prior, Adam was an Air Transport Pilot for SkyWest Airlines 2015-2019.

Previously, Adam was a Certified Flight Instructor at Embry Riddle Aeronautical University 2013-2015.

### **2. Disciplinary Information**

Adam Allgaier has no disciplinary history to disclose.

### **3. Other Business Activities**

Adam Allgaier is not engaged in any other investment-related business activity. Employment as an Air Transport Pilot for United Airlines does represent a substantial amount of Mr. Allgaier's time and income.

### **4. Additional Compensation**

No one who is not a client provides an economic benefit to Adam Allgaier for providing advisory services.

Please refer to the MCIA brochure for a discussion of economic benefits that MCIA receives in connection to its business relationship with Schwab Advisor Services and Fidelity/National Financial Services.

### **5. Supervision**

Adam Allgaier's advisory activities are supervised by Isaia Casas.

Isaia Casas is Manager of MCIA. As such, Mr. Casas is responsible for monitoring client portfolios for investment objectives and other supervisory reviews.

## **Mr. Michael Pollard**

### **1. Educational Background and Business Experience**

**Michael Pollard** - Born 1976

Oklahoma State University – Bachelor of Aviation Science 1999

Prior to joining MCIA in 2020, Michael has been an Air Transport Pilot for United Airlines since 2013 and remains active.

### **2. Disciplinary Information**

Michael Pollard has no disciplinary history to disclose.

### **3. Other Business Activities**

Michael Pollard is not engaged in any other investment-related business activity. Employment as an Air Transport Pilot for United Airlines does represent a substantial amount of Mr. Pollard's time and income.

### **4. Additional Compensation**

No one who is not a client provides an economic benefit to Michael Pollard for providing advisory services.

Please refer to the MCIA brochure for a discussion of economic benefits that MCIA receives in connection to its business relationship with Schwab Advisor Services and Fidelity/National Financial Services.

### **5. Supervision**

Michael Pollard advisory activities are supervised by Isaia Casas.

Isaia Casas is Manager of MCIA. As such, Mr. Casas is responsible for monitoring client portfolios for investment objectives and other supervisory reviews.

## **Mr. Parker Balstad**

### **1. Educational Background and Business Experience**

**Parker Balstad** - Born 1991

University of North Dakota – Nistler College of Business and Public Administration - 2014

Beginning in 2021, Parker has been an Air Transport Pilot for Delta Airlines and remains active.

Prior to joining MCIA in 2021, Parker was an Air Transport Pilot for SkyWest Airlines from 2015 to 2021.

Prior, Parker was a Flight Instructor at the University of North Dakota from 2014-2015.

### **2. Disciplinary Information**

Parker Balstad has no disciplinary history to disclose.

### **3. Other Business Activities**

Parker Balstad is not engaged in any other investment-related business activity. Employment as an Air Transport Pilot for Delta Airlines does represent a substantial amount of Mr. Balstad's time and income.

### **4. Additional Compensation**

No one who is not a client provides an economic benefit to Parker Balstad for providing advisory services.

Please refer to the MCIA brochure for a discussion of economic benefits that MCIA receives in connection to its business relationship with Schwab Advisor Services and Fidelity/National Financial Services.

### **5. Supervision**

Parker Balstad's advisory activities are supervised by Isaia Casas.

Isaia Casas is Manager of MCIA. As such, Mr. Casas is responsible for monitoring client portfolios for investment objectives and other supervisory reviews.

## **Mr. Conner Murray**

### **1. Educational Background and Business Experience**

**Conner Murray** - Born 1993

Augustana College (IL) - Business Administration Major: Finance, Management Information Systems and Accounting minor, 2015.

Prior to joining MCIA, Conner worked at JP Morgan Asset Management in Chicago, IL from 2018 – 2021.

Previously, Conner was an internal wholesaler at Jackson National, 2016 – 2018.

Previously, Conner was an analyst at Mercer Marsh & McLennan Companies, 2015-2016.

### **2. Disciplinary Information**

Conner Murray has no disciplinary history to disclose.

### **3. Other Business Activities**

Conner Murray is not engaged in any other investment-related business activity, or any other business activity representing a substantial amount of Mr. Murray's time or income.

### **4. Additional Compensation**

No one who is not a client provides an economic benefit to Conner Murray for providing advisory services.

Please refer to the MCIA brochure for a discussion of economic benefits that MCIA receives in connection to its business relationship with Schwab Advisor Services and Fidelity/National Financial Services.

### **5. Supervision**

Conner Murray's advisory activities are supervised by Isaia Casas.

Isaia Casas is Manager of MCIA. As such, Mr. Casas is responsible for monitoring client portfolios for investment objectives and other supervisory reviews.

**Mr. John (Jack) Strunc, CFP®**

## **1. Educational Background and Business Experience**

**John Strunc** - Born 1996

Creighton University – Bachelor of Science in Business Administration with emphasis in Financial Planning, 2019.

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Prior to joining MCIA, Jack worked at MBA Wealth Management, Inc. as a Client Service Liaison and Registered Representative in Broomfield, CO from 2021 – 2022.

Previously, Jack was a Registered Representative with Renaissance Financial and Agent for Minnesota Life Insurance Services in Omaha, NE from 2020 – 2021.

Jack was a professional baseball player for the Miami Marlins in Jupiter, FL from 2019 - 2020.

## **2. Disciplinary Information**

Jack Strunc has no disciplinary history to disclose.

## **3. Other Business Activities**

Jack is not engaged in any investment-related business activity, or any other business activity representing a substantial amount of Mr. Strunc's time or income.

## **4. Additional Compensation**

No one who is not a client provides an economic benefit to Jack Strunc for providing advisory services.

Please refer to the MCIA brochure for a discussion of economic benefits that MCIA receives in connection to its business relationship with Schwab Advisor Services and Fidelity/National Financial Services.

## **5. Supervision**

Jack Strunc's advisory activities are supervised by Isaia Casas.

Isaia Casas is Manager of MCIA. As such, Mr. Casas is responsible for monitoring client portfolios for investment objectives and other supervisory reviews.

## **Mr. Ryan Buffone**

### **1. Educational Background and Business Experience**

**Ryan Buffone** - Born 1991

Purdue University (IN) - Bachelor of Science, Aviation Technology, Flight Minor, Technology Leadership and Innovation

Ryan has been an Air Transport Pilot for United Airlines since 2019 and remains active.

Previously, Ryan worked at SkyWest Airlines as a Pilot from 2015 to 2018.

Previously, Ryan was a Continuing Lecturer and Certified Flight Instructor at Purdue University from 2014 to 2015.

### **2. Disciplinary Information**

Ryan Buffone has no disciplinary history to disclose.

### **3. Other Business Activities**

Ryan Buffone is not engaged in any other investment-related business activity. Employment as an Air Transport Pilot for United Airlines does represent a substantial amount of Mr. Balstad's time and income.

### **4. Additional Compensation**

No one who is not a client provides an economic benefit to Ryan Buffone for providing advisory services.

Please refer to the MCIA brochure for a discussion of economic benefits that MCIA receives in connection to its business relationship with Schwab Advisor Services and Fidelity/National Financial Services.

### **5. Supervision**

Ryan Buffone's advisory activities are supervised by Isaia Casas.

Isaia Casas is Manager of MCIA. As such, Mr. Casas is responsible for monitoring client portfolios for investment objectives and other supervisory reviews.