

**Patrick A. Sweeny  
David E. Connelly Jr.  
Philip R. McDonald  
Thomas J. Romano**

**Symmetry Partners, LLC**  
151 National Drive  
Glastonbury Connecticut 06033  
800-786-3309

October 2022

**FORM ADV PART 2B  
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Patrick A. Sweeny, David E. Connelly Jr., and Philip R. McDonald that supplements the Symmetry Partners, LLC brochure. You should have received a copy of that brochure. Please contact Symmetry Compliance at 800-786-3309 or [symmetrycompliance@symmetrypartners.com](mailto:symmetrycompliance@symmetrypartners.com) if you did not receive the brochure or if you have any questions about the contents of this supplement.

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

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## ***Educational Background and Business Experience***

Form ADV Part 2B, Item 2

**Name: Patrick A. Sweeny**

*Year of Birth:* 1961

*Formal Education after High School:*

- Fairfield University, B.A., Economics 1983

*Business Background for Preceding Five Years*

- Mr. Sweeny co-founded Symmetry Partners in 1994 and has been an owner and manager of the firm since that time. Mr. Sweeny is a member of the firm's investment committee and a portfolio manager for all of the Symmetry investment strategies. Prior to starting the firm in 1994, the last two positions Mr. Sweeny held were an institutional sales-trader on the equity desk with Weeden & Company, L.P. and an account executive with Dean Witter Reynolds.

**Name: David E. Connelly Jr.**

*Year of Birth:* 1965

*Formal Education after High School:*

- Northeastern University, B.S., Finance 1988
- University of New Haven, M.B.A. in Finance 1991

*Business Background for Preceding Five Years*

- Mr. Connelly co-founded Symmetry Partners in 1994 and has been an owner and manager of the firm since that time. Mr. Connelly is a member of the firm's investment committee and a portfolio manager for all of the Symmetry investment strategies. Prior to starting the firm in 1994, the last position Mr. Connelly held was an account executive with Dean Witter Reynolds.

**Name: Philip R. McDonald**

*Year of Birth:* 1976

*Formal Education after High School:*

- Georgetown University, B.S. International Finance & Commerce 1999
- University of Connecticut, M.B.A. in Finance and Venture Consulting 2009

*Business Background for Preceding Five Years*

- Mr. McDonald started with Symmetry Partners in 2010 as a Senior Research Associate. His current position with the firm is Managing Director, Research & Investments, and President of the Panoramic Funds. Mr. McDonald is also a member of the firm's investment committee and a portfolio manager for all of the Symmetry investment strategies. Prior to joining Symmetry Partners Mr. McDonald was a Senior Consultant for The Hartford Financial Services Group, Inc. and has held several positions at Prudential Capital Group, Inc.

*Certifications*

- In 2003, Mr. McDonald earned the Chartered Financial Analyst Designation ("CFA"). 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 a member; and 4) commit to abide by, and annually reaffirm, their adherence to the CFA institute Code of Ethics and Standards of Professional Conduct.

- In 2012, Mr. McDonald earned the Chartered Alternative Investment Analyst Designation (“CAIA”). To earn the CAIA designation, candidates must: 1) hold a U.S. Bachelor’s degree (or equivalent); 2) successfully pass both the Level I & II exams; 3) have more than one year of qualifying work experience (or four years of professional experience); and 4) maintain annual membership dues and abide by the membership agreement.

**Name: Thomas J. Romano**

*Year of Birth: 1977*

*Formal Education after High School:*

- Assumption College, 1999

*Business Background for Preceding Five Years*

- Mr. Romano started with Symmetry Partners in 2006 as an Internal Wholesaler and has held several significant Sales roles, leading to his current position with the firm as Head of Strategic Relationships and Product Development. Mr. Romano is also a member of the firm’s investment committee. Prior to joining Symmetry Partners Mr. Romano was a Portfolio Analyst at Advest.

### ***Disciplinary Information***

Form ADV Part 2B, Item 3

Symmetry Partners is required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice.

#### **Patrick A. Sweeny**

No information is applicable to this item for Mr. Sweeny.

- A. Mr. Sweeny has never been subject to a criminal or civil action in a domestic, foreign or military court of competent jurisdiction in which the supervised person
1. was convicted of, or pled guilty or nolo contendere ("no contest") to (a) any felony; (b) a misdemeanor that involved investments or an investment-related business, fraud, false statements or omissions, wrongful taking of property, bribery, perjury, forgery, counterfeiting, or extortion; or (c) a conspiracy to commit any of these offenses;
  2. is the named subject of a pending criminal proceeding that involves an investment-related business, fraud, false statements or omissions, wrongful taking of property, bribery, perjury, forgery, counterfeiting, extortion, or a conspiracy to commit any of these offenses;
  3. was found to have been involved in a violation of an investment-related statute or regulation; or
  4. was the subject of any order, judgment, or decree permanently or temporarily enjoining, or otherwise limiting, the supervised person from engaging in any investment-related activity, or from violating any investment-related statute, rule, or order.
- B. Mr. Sweeny has never been subject to an administrative proceeding before the SEC, any other federal regulatory agency, any state regulatory agency, or any foreign financial regulatory authority in which the supervised person
1. was found to have caused an investment-related business to lose its authorization to do business; or
  2. was found to have been involved in a violation of an investment-related statute or regulation and was the subject of an order by the agency or authority
    - a) denying, suspending, or revoking the authorization of the supervised person to act in an investment-related business;
    - b) barring or suspending the supervised person's association with an investment-related business;
    - c) otherwise significantly limiting the supervised person's investment-related activities; or
    - d) imposing a civil money penalty of more than \$2,500 on the supervised person.
- C. Mr. Sweeny has never been subject to a self-regulatory organization (SRO) proceeding in which the supervised person
1. was found to have caused an investment-related business to lose its authorization to do business; or

2. was found to have been involved in a violation of the SRO's rules and was: (i) barred or suspended from membership or from association with other members, or was expelled from membership; (ii) otherwise significantly limited from investment-related activities; or (iii) fined more than \$2,500.

- D. Mr. Sweeny has never been subject to any other proceeding in which a professional attainment, designation, or license of the supervised person was revoked or suspended because of a violation of rules relating to professional conduct.

Symmetry Partners is required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice.

**David E. Connelly Jr.**

No information is applicable to this item for Mr. Connelly.

- A. Mr. Connelly has never been subject to a criminal or civil action in a domestic, foreign or military court of competent jurisdiction in which the supervised person

1. was convicted of, or pled guilty or nolo contendere ("no contest") to (a) any felony; (b) a misdemeanor that involved investments or an investment-related business, fraud, false statements or omissions, wrongful taking of property, bribery, perjury, forgery, counterfeiting, or extortion; or (c) a conspiracy to commit any of these offenses;
2. is the named subject of a pending criminal proceeding that involves an investment-related business, fraud, false statements or omissions, wrongful taking of property, bribery, perjury, forgery, counterfeiting, extortion, or a conspiracy to commit any of these offenses;
3. was found to have been involved in a violation of an investment-related statute or regulation; or
4. was the subject of any order, judgment, or decree permanently or temporarily enjoining, or otherwise limiting, the supervised person from engaging in any investment-related activity, or from violating any investment-related statute, rule, or order.

- B. Mr. Connelly has never been subject to an administrative proceeding before the SEC, any other federal regulatory agency, any state regulatory agency, or any foreign financial regulatory authority in which the supervised person

1. was found to have caused an investment-related business to lose its authorization to do business; or
2. was found to have been involved in a violation of an investment-related statute or regulation and was the subject of an order by the agency or authority
  - a) denying, suspending, or revoking the authorization of the supervised person to act in an investment-related business;
  - b) barring or suspending the supervised person's association with an investment-related business;
  - c) otherwise significantly limiting the supervised person's investment-related activities; or
  - d) imposing a civil money penalty of more than \$2,500 on the supervised person.

- C. Mr. Connelly has never been subject to a self-regulatory organization (SRO) proceeding in which the supervised person

1. was found to have caused an investment-related business to lose its authorization to do business; or
  2. was found to have been involved in a violation of the SRO's rules and was: (i) barred or suspended from membership or from association with other members, or was expelled from membership; (ii) otherwise significantly limited from investment-related activities; or (iii) fined more than \$2,500.
- D. Mr. Connelly has never been subject to any other proceeding in which a professional attainment, designation, or license of the supervised person was revoked or suspended because of a violation of rules relating to professional conduct.

Symmetry Partners is required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice.

**Philip R. McDonald**

No information is applicable to this item for Mr. McDonald.

- A. Mr. McDonald has never been subject to a criminal or civil action in a domestic, foreign or military court of competent jurisdiction in which the supervised person
1. was convicted of, or pled guilty or nolo contendere ("no contest") to (a) any felony; (b) a misdemeanor that involved investments or an investment-related business, fraud, false statements or omissions, wrongful taking of property, bribery, perjury, forgery, counterfeiting, or extortion; or (c) a conspiracy to commit any of these offenses;
  2. is the named subject of a pending criminal proceeding that involves an investment-related business, fraud, false statements or omissions, wrongful taking of property, bribery, perjury, forgery, counterfeiting, extortion, or a conspiracy to commit any of these offenses;
  3. was found to have been involved in a violation of an investment-related statute or regulation; or
  4. was the subject of any order, judgment, or decree permanently or temporarily enjoining, or otherwise limiting, the supervised person from engaging in any investment-related activity, or from violating any investment-related statute, rule, or order.
- B. Mr. McDonald has never been subject to an administrative proceeding before the SEC, any other federal regulatory agency, any state regulatory agency, or any foreign financial regulatory authority in which the supervised person
1. was found to have caused an investment-related business to lose its authorization to do business; or
  2. was found to have been involved in a violation of an investment-related statute or regulation and was the subject of an order by the agency or authority
    - a) denying, suspending, or revoking the authorization of the supervised person to act in an investment-related business;
    - b) barring or suspending the supervised person's association with an investment-related business;
    - c) otherwise significantly limiting the supervised person's investment-related activities; or
    - d) imposing a civil money penalty of more than \$2,500 on the supervised person.

- C. Mr. McDonald has never been subject to a self-regulatory organization (SRO) proceeding in which the supervised person
1. was found to have caused an investment-related business to lose its authorization to do business; or
  2. was found to have been involved in a violation of the SRO's rules and was: (i) barred or suspended from membership or from association with other members, or was expelled from membership; (ii) otherwise significantly limited from investment-related activities; or (iii) fined more than \$2,500.
- D. Mr. McDonald has never been subject to any other proceeding in which a professional attainment, designation, or license of the supervised person was revoked or suspended because of a violation of rules relating to professional conduct.

**Thomas J. Romano**

No information is applicable to this item for Mr. Romano.

- A. Mr. Romano has never been subject to a criminal or civil action in a domestic, foreign or military court of competent jurisdiction in which the supervised person
1. was convicted of, or pled guilty or nolo contendere ("no contest") to (a) any felony; (b) a misdemeanor that involved investments or an investment-related business, fraud, false statements or omissions, wrongful taking of property, bribery, perjury, forgery, counterfeiting, or extortion; or (c) a conspiracy to commit any of these offenses;
  2. is the named subject of a pending criminal proceeding that involves an investment-related business, fraud, false statements or omissions, wrongful taking of property, bribery, perjury, forgery, counterfeiting, extortion, or a conspiracy to commit any of these offenses;
  3. was found to have been involved in a violation of an investment-related statute or regulation; or
  4. was the subject of any order, judgment, or decree permanently or temporarily enjoining, or otherwise limiting, the supervised person from engaging in any investment-related activity, or from violating any investment-related statute, rule, or order.
- B. Mr. Romano has never been subject to an administrative proceeding before the SEC, any other federal regulatory agency, any state regulatory agency, or any foreign financial regulatory authority in which the supervised person
1. was found to have caused an investment-related business to lose its authorization to do business; or
  2. was found to have been involved in a violation of an investment-related statute or regulation and was the subject of an order by the agency or authority
    - e) denying, suspending, or revoking the authorization of the supervised person to act in an investment-related business;
    - f) barring or suspending the supervised person's association with an investment-related business;
    - g) otherwise significantly limiting the supervised person's investment-related activities; or
    - h) imposing a civil money penalty of more than \$2,500 on the supervised person.
- C. Mr. Romano has never been subject to a self-regulatory organization (SRO) proceeding in which the supervised person
1. was found to have caused an investment-related business to lose its authorization to do business; or

2. was found to have been involved in a violation of the SRO's rules and was: (i) barred or suspended from membership or from association with other members, or was expelled from membership; (ii) otherwise significantly limited from investment-related activities; or (iii) fined more than \$2,500.
- D. Mr. Romano has never been subject to any other proceeding in which a professional attainment, designation, or license of the supervised person was revoked or suspended because of a violation of rules relating to professional conduct.

### ***Other Business Activities***

Form ADV Part 2B, Item 4

#### **Patrick A. Sweeny**

Mr. Sweeny is not engaged in any other business activities.

- A. Mr. Sweeny is not actively engaged in any investment-related business or occupation, including registered, or has an application pending to register, as a broker-dealer, registered representative of a broker-dealer, futures commission merchant ("FCM"), commodity pool operator ("CPO"), commodity trading advisor ("CTA"), or an associated person of an FCM, CPO, or CTA.
- B. Mr. Sweeny is not actively engaged in any business or occupation for compensation not discussed in response to Item 4.A, above.

#### **David E. Connelly Jr.**

Mr. Connelly is not engaged in any other business activities.

- A. Mr. Connelly is not actively engaged in any investment-related business or occupation, including registered, or has an application pending to register, as a broker-dealer, registered representative of a broker-dealer, futures commission merchant ("FCM"), commodity pool operator ("CPO"), commodity trading advisor ("CTA"), or an associated person of an FCM, CPO, or CTA.
- B. Mr. Connelly is not actively engaged in any business or occupation for compensation not discussed in response to Item 4.A.

#### **Philip R. McDonald**

Mr. McDonald is not engaged in any other business activities.

- A. Mr. McDonald is not actively engaged in any investment-related business or occupation, including registered, or has an application pending to register, as a broker-dealer, registered representative of a broker-dealer, futures commission merchant ("FCM"), commodity pool operator ("CPO"), commodity trading advisor ("CTA"), or an associated person of an FCM, CPO, or CTA.
- B. Mr. McDonald is not actively engaged in any business or occupation for compensation not discussed in response to Item 4.A.

#### **Thomas J. Romano**

Mr. Romano is not engaged in any other business activities.

- C. Mr. Romano is not actively engaged in any investment-related business or occupation.

Mr. Romano is registered with Foreside Financial Services, which is not affiliated with Symmetry Partners, LLC, or its affiliates.

Patrick A. Sweeny CRD# 1490512  
David E. Connelly Jr. CRD# 2269331  
Philip R. McDonald CRD# 5982027  
Thomas J. Romano CRD# 3274044  
Form ADV Part 2B  
Brochure Supplement

IARD No.: 120982  
10/2022

Mr. Romano is not actively engaged in any business or occupation for compensation not discussed in response to Item 4.A.

### ***Additional Compensation***

Form ADV Part 2B, Item 5

Mr. Patrick A. Sweeny does not receive any additional compensation such as, but not limited to, sales awards, other prizes and from any other source outside of Symmetry Partners.

Mr. David E. Connelly Jr. does not receive any additional compensation such as, but not limited to, sales awards, other prizes and from any other source outside of Symmetry Partners.

Mr. Philip R. McDonald does not receive any additional compensation such as, but not limited to, sales awards, other prizes and from any other source outside of Symmetry Partners.

Mr. Thomas J. Romano does not receive any additional compensation such as, but not limited to, sales awards, other prizes and from any other source outside of Symmetry Partners.

Patrick A. Sweeny CRD# 1490512  
David E. Connelly Jr. CRD# 2269331  
Philip R. McDonald CRD# 5982027  
Thomas J. Romano CRD# 3274044  
Form ADV Part 2B  
Brochure Supplement

IARD No.: 120982  
10/2022

## ***Supervision***

Form ADV Part 2B, Item 6

Patrick A. Sweeny is a co-owner of Symmetry Partners and subject to the firm's policies and procedures. Mr. Sweeny is supervised by David E. Connelly Jr., Member and Manager. Mr. Connelly can be reached at 860-734-2083.

David E. Connelly Jr. is a co-owner of Symmetry Partners and subject to the firm's policies and procedures. Mr. Connelly is supervised by Patrick A. Sweeny, Member and Manager. Mr. Sweeny can be reached at 860-734-2081.

Philip R. McDonald is the Managing Director, Research & Investments with Symmetry Partners and subject to the firm's policies and procedures. Mr. McDonald is supervised by Patrick A. Sweeny and David E. Connelly Jr. Mr. Sweeny can be reached at 860-734-2081. Mr. Connelly can be reached at 860-734-2083.

Thomas J. Romano is the Head of Strategic Relationships and Product Development at Symmetry Partners and subject to the firm's policies and procedures. Mr. Romano is supervised by Patrick A. Sweeny and David E. Connelly Jr. Mr. Sweeny can be reached at 860-734-2081. Mr. Connelly can be reached at 860-734-2083.

Patrick A. Sweeny CRD# 1490512  
David E. Connelly Jr. CRD# 2269331  
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10/2022

### ***Additional Information***

Form ADV Part 2B, Item 7

Pursuant to the academic nature of the Symmetry investment philosophy, Symmetry has engaged a consultant from academia to inform on its investment strategies. The consultant's name is **John B. McDermott, Ph.D.**

Dr. McDermott is a member of the firm's investment committee and a portfolio manager for all the Symmetry investment strategies.

Dr. McDermott acquired a Bachelor of Science in Engineering from the U.S. Coast Guard Academy in New London, CT in 1990. He received his M.B.A. in Finance from Columbia University in New York, NY. In 2000, he received his Ph.D. in Finance from the University of Connecticut in Storrs, CT. Dr. McDermott is currently employed at Fairfield University located in Fairfield, CT as an Associate Professor of Finance.