



**MR. CHAD A. WARRICK**  
SUMMIT WEALTH PARTNERS, LLC

800 N. ORANGE AVENUE  
SUITE 302  
ORLANDO, FLORIDA 32801

407-656-2252  
866-977-2252

This Brochure Supplement provides information about Mr. Chad A. Warrick that supplements the Summit Wealth Partners, LLC. Firm Brochure. You should have received a copy of that Brochure. Please contact Mr. Warrick at our Orlando, FL office if you did not receive our Brochure or if you have any questions about the contents of this supplement. Additional information about Mr. Warrick is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

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

Mr. Warrick is the Co-President and CEO of Summit Wealth Partners, LLC. He is also the firm's Chief Investment Officer and Chief Compliance Officer.

*Year of Birth:* 1975.

*Formal Education after High School*  
Stetson University, B.B.A 1999.

*Business Background Previous Five Years:*  
2017 - Present - Summit Wealth Partners, LLC - Co-President & CEO, CIO, CCO  
2012 - 2017 - Summit Wealth Partners, LLC (formally Inc.), Senior Wealth Advisor, CCO, CIO

### **Item 3- Disciplinary Information:**

We are 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. No information concerning Mr. Warrick is applicable to this Item.

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

Mr. Warrick is not actively engaged in any investment-related business or occupation other than Summit Wealth Partners, LLC.

### **Item 5 - Additional Compensation:**

Mr. Warrick does not receive any undisclosed economic benefits such as sales awards or prizes for providing advisory services. As stated in item 10 to Summit's Firm Brochure, certain investment adviser representatives associated with Summit, in their individual capacities, are also licensed insurance agents with various insurance companies, and in such capacity, may recommend, on a fully disclosed commission basis, the purchase of certain insurance products. While Summit does not sell such insurance products to its investment advisory clients, Summit does permit these investment adviser representatives, in their individual capacities as licensed insurance agents, to sell insurance products to its investment advisory

clients. A conflict of interest exists to the extent that any compensation for any services puts the provider at odds with the client. It is in the provider's interest to provide services in exchange for compensation. However, it is in the recipient's interest to pay compensation for value received.

### **Item 6 - Supervision:**

We monitor our investment adviser representatives and client accounts on a continuous and best efforts basis and conduct formal reviews with our clients as specified in the client's Financial Services Agreement. Factors that might suggest an account review in addition to the scheduled reviews include, but are not limited to, the following: changes in investment strategy, large deposits or withdrawals from the account and changes in the client's financial situation.



**MR. JASON PRINT**  
SUMMIT WEALTH PARTNERS, LLC

999 VANDERBILT BEACH ROAD  
SUITE 609  
NAPLES, FLORIDA 34108

239-254-1875  
866-370-2330

This Brochure Supplement provides information about Mr. Jason P. Print that supplements the Summit Wealth Partners, LLC. Firm Brochure. You should have received a copy of that Brochure. Please contact Mr. Print at our Naples, FL office if you did not receive our Brochure or if you have any questions about the contents of this supplement. Additional information about Mr. Print is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

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

Mr. Print is the Co-President & CEO of Summit Wealth Partners, LLC. He is also an Investment Advisor Representative & Senior Wealth Advisor and Portfolio Manager with Summit Wealth Partners, LLC.

*Year of Birth:* 1978.

### *Formal Education after High School*

University of Dayton, B.A., Economics, 2000.  
Northwestern University – CFP designation, 2004.

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

The CERTIFIED FINANCIAL PLANNER™ word mark, CFP® certification word mark, and CFP® (with plaque design) certification logo (collectively, the “Certification Marks”) are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”). (The website for CFP Board is located at <https://www.cfp.net/>) The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. Currently, more than 89,000 individuals have obtained CFP® certification in the United States.

To attain the right to use the CFP® marks, an individual must fulfill the following requirements:

- Education – Complete CFP Board-approved coursework and attain a bachelor’s degree or higher from an accredited college or university (accreditation must be recognized by the U.S. Department of Education at the time the degree is awarded).
- Examination – Pass the comprehensive CFP® Certification Examination.
- Experience – Complete 6,000 hours of professional experience related to the 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 commit to comply with CFP Board’s *Code of Ethics and Standards of Conduct*.

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 Certification Marks:

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be subject to CFP Board's enforcement process, which may include a public sanction and the suspension or permanent revocation of CFP® certification.

- Continuing Education – Complete 30 hours of continuing education hours every two years, including two hours on CFP Board's *Code and Standards*.

***Business Background Previous Five Years:***

2017 – Present – Summit Wealth Partners, LLC – Co-President & CEO, Senior Wealth Advisor, Portfolio Manager

2012 – 2017 – Summit Wealth Partners, LLC (formerly Inc.) - Senior Wealth Advisor, Portfolio Manager

**Item 3- Disciplinary Information:**

We are 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. No information concerning Mr. Print is applicable to this Item.

**Item 4 – Other Business Activities:**

Mr. Print is not actively engaged in any investment-related business or occupation other than Summit Wealth Partners, LLC.

**Item 5 - Additional Compensation:**

Mr. Print does not receive any undisclosed economic benefits such as sales awards or prizes for providing advisory services. As stated in item 10 to Summit's Firm Brochure, certain investment adviser representatives associated with Summit, in their individual capacities, are also licensed insurance agents with various insurance companies, and in such capacity, may recommend, on a fully disclosed commission basis, the purchase of certain insurance products. While Summit does not sell such insurance products to its investment advisory clients, Summit does permit these investment adviser representatives, in their individual capacities as licensed insurance agents, to sell insurance products to its investment advisory clients. A conflict of interest exists to the extent that any compensation for any services puts the provider at odds with the client. It is in the provider's interest to provide services in exchange for compensation. However, it is in the recipient's interest to pay compensation for value received.

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**MR. BRADLEY D. TOWLE**  
SUMMIT WEALTH PARTNERS, LLC

999 VANDERBILT BEACH ROAD  
SUITE 609  
NAPLES, FLORIDA 34108

239-254-1875  
866-370-2330

This Brochure Supplement provides information about Mr. Bradley D. Towle that supplements the Summit Wealth Partners, LLC. Firm Brochure. You should have received a copy of that Brochure. Please contact Mr. Towle at our Naples, FL office if you did not receive our Brochure or if you have any questions about the contents of this supplement. Additional information about Mr. Towle is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

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

Mr. Towle is an Investment Advisor Representative and Senior Wealth Advisor with Summit Wealth Partners, LLC.

*Year of Birth:* 1956.

#### *Formal Education after High School*

Wilfred Laurier University – BBA in Business and Economics, 1978. University of Wisconsin– Graduate School of Banking, 1997.

Northwestern University – ABA Graduate Trust School, 2005.

#### *Business Background Previous Five Years:*

2012 – Present – Summit Wealth Partners, LLC (formerly Inc.). - Senior Wealth Advisor

### **Item 3- Disciplinary Information:**

We are 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. No information concerning Mr. Towle is applicable to this Item.

### **Item 4 – Other Business Activities:**

Mr. Towle is not actively engaged in any investment-related business or occupation other than Summit Wealth Partners, LLC.

### **Item 5 - Additional Compensation:**

Mr. Towle does not receive any undisclosed economic benefits such as sales awards or prizes for providing advisory services. As stated in item 10 to Summit's Firm Brochure, certain investment adviser representatives associated with Summit, in their individual capacities, are also licensed insurance agents with various insurance companies, and in such capacity, may recommend, on a fully disclosed commission basis, the purchase of certain insurance products. While Summit does not sell such insurance products to its investment advisory clients, Summit does permit these investment adviser representatives, in their individual capacities as licensed insurance agents, to sell insurance products to its investment advisory clients. A conflict of interest exists to the extent that any compensation for any

services puts the provider at odds with the client. It is in the provider's interest to provide services in exchange for compensation. However, it is in the recipient's interest to pay compensation for value received.

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**MR. ANDREW DICKENS**  
SUMMIT WEALTH PARTNERS, LLC

800 N. ORANGE AVENUE  
SUITE 302  
ORLANDO, FLORIDA 32801

407-656-2252  
866-977-2252

This Brochure Supplement provides information about Mr. Andrew Dickens that supplements the Summit Wealth Partners, LLC Firm Brochure. You should have received a copy of that Brochure. Please contact Mr. Dickens in our Orlando, FL office if you did not receive our Brochure or if you have any questions about the contents of this supplement. Additional information about Mr. Dickens is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

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

Mr. Dickens is an Investment Advisor Representative & Associate Wealth Advisor of Summit Wealth Partners, LLC.

*Year of Birth:* - 1976

*Formal Education after High School*

Santa Fe College 1999-2000  
University of Florida 2001-2002

*Business Background Previous Five Years:*

2014 - Present - Summit Wealth Partners, LLC (formerly Inc.) - Wealth Advisor

*Professional Designations:*

Accredited Investment Fiduciary® (AIF®)  
Certified Business Valuation Specialist (CBVS™)  
Certified Exit Planner (CEXP)

## **Item 3- Disciplinary Information:**

We are 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. No information concerning Mr. Dickens is applicable to this Item.

## **Item 4 – Other Business Activities:**

Mr. Dickens is a managing shareholder of Legacy Business Design LLC specializing in closely held business merger and acquisition consulting. Mr. Dickens is also a partner in Tax and Business Solutions LLC providing tax, accounting, payroll and business advisory services.

## **Item 5 - Additional Compensation:**

Mr. Dickens does not receive any undisclosed economic benefits such as sales awards or prizes for providing advisory services. As stated in item 10 to Summit's Firm Brochure, certain investment adviser representatives associated with Summit, in their individual capacities, are also licensed insurance agents with various insurance companies, and in

such capacity, may recommend, on a fully disclosed commission basis, the purchase of certain insurance products. While Summit does not sell such insurance products to its investment advisory clients, Summit does permit these investment adviser representatives, in their individual capacities as licensed insurance agents, to sell insurance products to its investment advisory clients. A conflict of interest exists to the extent that any compensation for any services puts the provider at odds with the client. It is in the provider's interest to provide services in exchange for compensation. However, it is in the recipient's interest to pay compensation for value received.

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**MR. JEFFREY E. JANSON**  
SUMMIT WEALTH PARTNERS, LLC

999 VANDERBILT BEACH ROAD  
SUITE 609  
NAPLES, FLORIDA 34108

239-254-1875  
866-370-2330

This Brochure Supplement provides information about Mr. Jeffrey Janson that supplements the Summit Wealth Partners, LLC Firm Brochure. You should have received a copy of that Brochure. Please contact Mr. Janson in our Naples, FL office if you did not receive our Brochure or if you have any questions about the contents of this supplement. Additional information about Mr. Janson is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

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

Mr. Janson is an Investment Advisor Representative, Senior Wealth Advisor and Portfolio Manager with Summit Wealth Partners, Inc.

*Year of Birth:* - 1964

*Formal Education after High School:* Hyles-Anderson College, Pastoral Theology, 1986.

*Professional Designations:* FEDC - Fiduciary Educator for Defined Contribution Plans, AIFA® - Accredited Investment Fiduciary Analyst, BCAA - Board Certified in Asset Allocation, BCE - Board Certified in Estate Planning, BCM - Board Certified in Mutual Funds, CFS Certified Fund Specialist, LIC - Licensed Insurance Counselor, MSFS - Masters in Financial Services, Certified Digital Asset Advisor (CDAA) & Certified Financial Planner (CFP®).

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- Continuing Education – Complete 30 hours of continuing education hours every two years, including two hours on CFP Board’s *Code and Standards*.

***Business Background Previous Five Years:***

2014 – Present – Summit Wealth Partners, LLC (formerly Inc.) – Senior Wealth Advisor  
Mr. Janson has held the CFP® marks since March of 1992.

### **Item 3- Disciplinary Information:**

We are 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. No information concerning Mr. Janson is applicable to this Item.

### **Item 4 – Other Business Activities:**

Mr. Janson is engaged in business other than Summit Wealth Partners, LLC and Summit Asset Protection Group, LLC. Mr. Janson is an author and retirement plan consultant. As such, he does receive remuneration from royalties on book sales and other consulting fees. He also provides educational programs and consulting services that are geared toward implementing retirement plan best practices.

### **Item 5 - Additional Compensation:**

Mr. Janson does not receive any undisclosed economic benefits such as sales awards or prizes for providing advisory services. As stated in item 10 to Summit’s Firm Brochure, certain investment adviser representatives associated with Summit, in their individual capacities, are also licensed insurance agents with various insurance companies, and in such capacity, may recommend, on a fully disclosed commission basis, the purchase of certain insurance products. While Summit does not sell such insurance products to its investment advisory clients, Summit does permit these investment adviser representatives, in their individual capacities as licensed insurance agents, to sell insurance products to its investment advisory clients. A conflict of interest exists to the extent that any compensation for any services puts the provider at odds with the client. It is in the provider’s interest to provide services in exchange for compensation. However, it is in the recipient’s interest to pay compensation for value received.

### **Item 6 - Supervision:**

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**MS. AMANDA PATE**  
SUMMIT WEALTH PARTNERS, LLC

800 N. ORANGE AVENUE  
SUITE 302  
ORLANDO, FLORIDA 32801

407-656-2252  
866-977-2252

This Brochure Supplement provides information about Ms. Amanda Pate that supplements the Summit Wealth Partners, LLC Firm Brochure. You should have received a copy of that Brochure. Please contact Ms. Pate in our Orlando, FL office if you did not receive our Brochure or if you have any questions about the contents of this supplement. Additional information about Ms. Pate is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

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

Ms. Pate is an Investment Advisor Representative and Operations Manager with Summit Wealth Partners, LLC.

*Year of Birth:* - 1987

### *Formal Education after High School*

Florida State University, B.S. Environmental Studies, 2010

Florida State University, Undergraduate Certificate in Urban & Regional Planning Studies, 2010

Florida Institute of Technology, M.S. Management/Human Resource Management, 2014

Florida State University, Certificate in Financial Planning, 2016

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

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- Continuing Education – Complete 30 hours of continuing education hours every two years, including two hours on CFP Board's *Code and Standards*.

***Business Background Previous Five Years:***

2014 – Present – Summit Wealth Partners, LLC (formerly Inc.)

**Item 3- Disciplinary Information:**

We are 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. No information concerning Ms. Pate is applicable to this Item.

**Item 4 – Other Business Activities:**

Ms. Pate is not actively engaged in any investment-related business or occupation other than Summit Wealth Partners, LLC and Summit Asset Protection Group, LLC.

**Item 5 - Additional Compensation:**

Ms. Pate does not receive any undisclosed economic benefits such as sales awards or prizes for providing advisory services. As stated in item 10 to Summit's Firm Brochure, certain investment adviser representatives associated with Summit, in their individual capacities, are also licensed insurance agents with various insurance companies, and in such capacity, may recommend, on a fully disclosed commission basis, the purchase of certain insurance products. While Summit does not sell such insurance products to its investment advisory clients, Summit does permit these investment adviser representatives, in their individual capacities as licensed insurance agents, to sell insurance products to its investment advisory clients. A conflict of interest exists to the extent that any compensation for any services puts the provider at odds with the client. It is in the provider's interest to provide services in exchange for compensation. However, it is in the recipient's interest to pay compensation for value received.

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**MS. KRISTIANA DANIELS**  
SUMMIT WEALTH PARTNERS, LLC

999 VANDERBILT BEACH ROAD, SUITE 609  
NAPLES, FLORIDA 34108

239-254-1875  
866-370-2330

This Brochure Supplement provides information about Ms. Kristiana Daniels that supplements the Summit Wealth Partners, LLC Firm Brochure. You should have received a copy of that Brochure. Please contact Ms. Daniels in our Naples office if you did not receive our Brochure or if you have any questions about the contents of this supplement. Additional information about Ms. Daniels is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

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

Ms. Daniels is an Investment Advisor Representative & Wealth Advisor with Summit Wealth Partners, LLC.

*Year of Birth:* - 1992

### *Formal Education after High School*

Taylor University, Bachelor of Arts in Psychology, 2014  
Florida State University, Certificate in Financial Planning 2017 - 2018

*Professional Designations:* Certified Financial Planner (CFP®)  
Enrolled Agent (EA)  
Behavioral Financial Advisor (BFA™)

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be subject to CFP Board's enforcement process, which may include a public sanction and the suspension or permanent revocation of CFP® certification.

- Continuing Education – Complete 30 hours of continuing education hours every two years, including two hours on CFP Board's *Code and Standards*.

***Business Background Previous Five Years:***

2015 – Present – Summit Wealth Partners, LLC (formerly Inc.)

### **Item 3- Disciplinary Information:**

We are 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. No information concerning Ms. Daniels is applicable to this Item.

### **Item 4 – Other Business Activities:**

Ms. Daniels is not actively engaged in any investment-related business or occupation other than Summit Wealth Partners, LLC and Summit Asset Protection Group, LLC.

### **Item 5 – Additional Compensation:**

Ms. Daniels does not receive any undisclosed economic benefits such as sales awards or prizes for providing advisory services. As stated in item 10 to Summit's Firm Brochure, certain investment adviser representatives associated with Summit, in their individual capacities, are also licensed insurance agents with various insurance companies, and in such capacity, may recommend, on a fully disclosed commission basis, the purchase of certain insurance products. While Summit does not sell such insurance products to its investment advisory clients, Summit does permit these investment adviser representatives, in their individual capacities as licensed insurance agents, to sell insurance products to its investment advisory clients. A conflict of interest exists to the extent that any compensation for any services puts the provider at odds with the client. It is in the provider's interest to provide services in exchange for compensation. However, it is in the recipient's interest to pay compensation for value received.

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**MS. SHARON HOOPER**  
SUMMIT WEALTH PARTNERS, LLC

2959 LUCERNE DR. SE  
SUITE 120A  
GRAND RAPIDS, MI 49546

866-370-2330  
616-485-3723

This Brochure Supplement provides information about Ms. Sharon Hooper that supplements the Summit Wealth Partners, LLC Firm Brochure. You should have received a copy of that Brochure. Please contact Ms. Hooper in our Michigan office if you did not receive our Brochure or if you have any questions about the contents of this supplement. Additional information about Ms. Hooper is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

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

Ms. Hooper is an Investment Advisor Representative & Senior Wealth Advisor with Summit Wealth Partners, LLC.

*Year of Birth:* - 1971

*Formal Education after High School:*

Western Michigan University, 1989-1992  
College of Financial Planning, Registered Paraplanner, 1992

*Business Background Previous Five Years:*

05/2020 - Present - Summit Wealth Partners, LLC  
2014 - 05/2020 - ARGI Investment Services, LLC

*Professional Designations:*

Certified Senior Advisor (CSA) ®  
Behavioral Financial Advisor, BFA™

### **Item 3- Disciplinary Information:**

We are 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. No information concerning Ms. Hooper is applicable to this Item.

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Ms. Hooper is not actively engaged in any investment-related business or occupation other than Summit Wealth Partners, LLC and Summit Asset Protection Group, LLC.

### **Item 5 - Additional Compensation:**

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**MR. RYAN GAVIN**  
SUMMIT WEALTH PARTNERS, LLC

999 VANDERBILT BEACH ROAD  
SUITE 609  
NAPLES, FLORIDA 34108

239-254-1875  
866-370-2330

This Brochure Supplement provides information about Mr. Ryan Gavin that supplements the Summit Wealth Partners, LLC. Firm Brochure. You should have received a copy of that Brochure. Please contact Mr. Gavin in our Naples, FL office if you did not receive our Brochure or if you have any questions about the contents of this supplement. Additional information about Mr. Gavin is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

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

Mr. Gavin is an Investment Advisor Representative & Portfolio Manager of Summit Wealth Partners, LLC.

*Year of Birth:* - 1985

*Formal Education after High School*

Florida SouthWestern State College, A.A. 2005-2008  
Florida Gulf Coast University, B.S. Health Science 2008-2010  
Florida Gulf Coast University, B.S. Finance 2014-2017

*Business Background Previous Five Years:*

2021 - Present - Summit Wealth Partners, LLC (formerly Inc.) - Portfolio Manager  
2018 - 2021 - Naples Global Advisors - Investment Analyst  
2010 - 2017 - Lee Health - Customer Service Representative

*Professional Designations:*

Chartered Financial Analyst® (CFA)

### **Item 3- Disciplinary Information:**

We are 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. No information concerning Mr. Gavin is applicable to this Item.

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

Mr. Gavin is not actively engaged in any investment-related business or occupation other than Summit Wealth Partners, LLC and Summit Asset Protection Group, LLC.

### **Item 5 - Additional Compensation:**

Mr. Gavin does not receive any undisclosed economic benefits such as sales awards or prizes for providing advisory services. As stated in item 10 to Summit's Firm Brochure, certain investment adviser representatives associated with

Summit, in their individual capacities, are also licensed insurance agents with various insurance companies, and in such capacity, may recommend, on a fully disclosed commission basis, the purchase of certain insurance products. While Summit does not sell such insurance products to its investment advisory clients, Summit does permit these investment adviser representatives, in their individual capacities as licensed insurance agents, to sell insurance products to its investment advisory clients. A conflict of interest exists to the extent that any compensation for any services puts the provider at odds with the client. It is in the provider's interest to provide services in exchange for compensation. However, it is in the recipient's interest to pay compensation for value received.

#### **Item 6 - Supervision:**

We monitor our investment adviser representatives and client accounts on a continuous and best efforts basis and conduct formal reviews with our clients as specified in the client's Financial Services Agreement. Factors that might suggest an account review in addition to the scheduled reviews include, but are not limited to, the following: changes in investment strategy, large deposits or withdrawals from the account and changes in the client's financial situation. Messrs. Chad Warrick and Jason Print, Summit's Co-Presidents and CEOs are responsible for supervising Mr. Gavin. Messrs. Warrick and Print's phone number is 407-656-2252.