

# Jonathan Perrin

intellicents investment solutions inc.

7101 College Boulevard Suite 620

Overland Park, KS 66210

[www.intellicents.com](http://www.intellicents.com)

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**This Brochure Supplement provides information about Jonathan Perrin that supplements the intellicents investment solutions inc. Brochure, a copy of which you should have received. Please contact our Director of Operations at 507-377-2919 if you did not receive intellicents investment solutions inc.'s Brochure or if you have any questions about the contents of this supplement. Additional information about Jonathan Perrin is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

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

Jonathan Perrin born in 1993, received the following formal education after high school:

- 2011-2015 – Oklahoma State University, Stillwater Oklahoma – History
- 2021-2022 – The University of Missouri, Columbia Missouri – Personal Financial Planning

Business experience includes:

- November 2022 – current Financial Consultant for intellicents investment solutions inc., Overland Park, KS 66210
- May 2020 – November 2022 Investment Advisor Representative at Waterfront Advisors, Overland Park, KS 66209
- February 2018 – May 2020 Investment Advisor Representative at Satya Investment Management, Leawood, KS 66211
- August 2018 – April 2019 Pitcher for the Kansas City Royals, Kansas City, MO
- June 2015 – August 2018 Pitcher for the Milwaukee Brewers, Milwaukee, WI

Professional examinations, certifications and/or designations include:

- FINRA Securities examinations: Series 65
- Certified Financial Planner (“CFP® “)

The CFP® designation is a financial planning credential awarded by the Certified Financial Planner Board of Standards, Inc. to individuals who satisfy its educational, work experience and ethics requirements. Recipients of the CFP® certification hold a bachelor’s degree (or higher) from an accredited college or university, have completed three years of full-time personal financial planning experience and successfully completed the CFP® Certification Exam. In order to maintain the designation, CFP® holders must satisfy ongoing requirements which include at least 30 hours of continuing education every two years.

## **Item 3- Disciplinary Information**

intellicents investment solutions inc. (“iis”) 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. iis has no information to disclose in relation to this item.

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

intellicents investment solutions inc. is part of a consortium of companies that focus on providing employee benefit services to employers. The services include investment advisory services provided through iis, and through its affiliated companies: life, disability and health insurance services, and benefits consulting services that range from defined contribution retirement Plans to employee wellness programs.

For services provided by the affiliated intellicents investment solutions companies, the companies and Jonathan Perrin may receive consulting fees and/or commissions on sales of any investment and insurance product sold to clients. iis may also provide investment advisory services to the clients of the affiliated intellicents investment solutions companies; however, iis never receives commissions on any assets under management for which iis receives advisory fees.

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

Because of the nature and extent of the business intellicents investment solutions (iis and its affiliates) provides various custodians and mutual fund companies “revenue sharing” in the form of shareholder servicing fees, sub-transfer agency fees, 12b-1 fees and finders fees. These fees are fully disclosed to plan sponsors and participants and are passed on to the plan sponsor or the plan for use in offsetting plan related fees.

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

Jonathan Perrin is one of several supervised persons who give general advice on behalf of intellicents investment solutions and under the direct supervision of Mr. Nicholas Holmes. Inquiries about Jonathan Perrin should be forwarded to Mr. Nicholas Holmes at 800-880-4015.