

# Thomas A. Krusic

intellicents investment solutions, inc.

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April 2022

**This Brochure Supplement provides information about Thomas Krusic 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 Thomas Krusic is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

## Item 2- Educational Background and Business Experience

Thomas Krusic born in 1980, received the following formal education after high school:

1998-2002 - Loyola Marymount University, Los Angeles, CA – BA in Business Administration

Business experience includes:

- May 2021 - Present – Financial Consultant for intellicents investment solutions, inc., Golden, CO
- 2017 – April 2021 – Investment Advisor for ABG Consultants, LLC, Salt Lake City, UT
- 2015 – 2017 – Investment Advisor for Brighton Jones, LLC, Seattle, WA
- 2009 – March 2015 – Managing Consultant for Spectrum Pension Consultants, Inc., Tacoma, WA

Professional examinations, certifications and/or designations include:

- FINRA Securities examinations Series 65
- Certified Financial Planner (“CFP®“)
- Accredited Investment Fiduciary® (“AIF®“)
- Certified Pension Consultant (CPC)
- Life, Accident & Health License

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.

AIF® is a professional designation which includes one of the following combinations: (1) minimum of two year of relevant experience with a bachelor’s degree (or higher) and a professional credential; (2) minimum of five years of relevant experience with a bachelor’s degree (or higher) or a professional credential; (3) minimum of eight years of relevant experience. The remaining requirements are to enroll in and complete a training course, pass an examination and satisfy the Code of Ethics and Conduct Standards. The designees must accrue a minimum of six hours of continuing education annually.

CPC credential is conferred by American Society of Pension Professionals & Actuaries (ASPPA). Individuals must satisfy its educational and work experience requirements to include coursework, exam and minimum of three years’ experience in the retirement plan industry or complete the Retirement Plan Fundamentals certificate program. CPCs work alongside employers to formulate, implement, administer, and maintain qualified retirement plans. In order to maintain these credentials, the CPC holders must acquire 40 hours of continuing education credits, to include Ethics, in a two-year cycle and renew their ASPPA membership annually.

### **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 relations 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.

Insurance services are provided through intellicents inc. Thomas Krusic is a licensed agent of multiple insurance companies.

For services provided by the affiliated intellicents investment solutions companies, the companies and Thomas Krusic 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**

Thomas Krusic 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, Chief Compliance Officer. Inquiries about Thomas Krusic should be forwarded to Mr. Nicholas Holmes at 800-880-4015.