

# Brian T. Paulsen

intellicents investment solutions inc.

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

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

Brian T. Paulsen, born in 1972 received the following formal education after high school:

- 1991-1994 University of Missouri, Columbia, MO – Bachelor of Science: Business Administration and Marketing

Business experience includes:

- January 2024 – Present: Financial Consultant, intellicents investment solutions, inc.
- February 2015 – Present: Personal Wealth Manager & COO, True Wealth & Company LLC, Overland Park, KS
- February 2015 – Present: Owner, Paulsen Consulting, Inc., Overland Park, KS

Professional examinations, certifications and/or designations include:

- FINRA Securities examinations: Series 66
- Life, Accident & Health License

## **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 Brian Paulsen 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.

1. Mr. Paulsen is also registered as an Investment Advisor Representative (“IAR”) with another Registered Investment Adviser (“RIA”) outside of intellicents called True Wealth & Company LLC\*. Mr. Paulsen spends approximately 180 hours per month in this capacity.

2. Mr. Paulsen also serves as the Owner of Paulsen Consulting, Inc. Mr. Paulsen spends approximately 1 hour of his time per month in this capacity.

3. Mr. Paulsen also serves on the Advisory Board of HPad Inc., providing guidance on the corporation's research, product development, and marketing activities as requested. Mr. Paulsen spends approximately 1 hour of his time per month in this capacity.

\*intellicents investment solutions, inc. ("iis") and True Wealth & Company ("True Wealth") are not affiliated organizations except to the extent that iis and True Wealth have individuals that are dually registered between the two firms as Investment Advisor Representatives ("IARs").

#### **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 finder's 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.

Mr. Paulsen has additional business activities where compensation is received that are detailed in Item 4 above.

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

Brian Paulsen 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 Brian Paulsen should be forwarded to Mr. Nicholas Holmes at 800-880-4015.