

# Matthew Stay

intellicents investment solutions inc.

402 Main Street W.

Lake Mills, IA 50450

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

March 2023

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

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

Matthew Stay born in 1975 received the following formal education after high school:

- 1994-1997 University of Minnesota, Minneapolis, MN – Bachelor of Science: Agricultural Business Management

Business experience includes:

- April 2021 – Present: Personal Financial Management Advisor of intellicents investment solutions inc., Lake Mills, IA
- November 2015 – April 2021: Commodities Marketing Advisor with Cargill Inc. Wayzata, MN
- June 2010 – October 2015: Regional Sales Manager with Almco Inc. Albert Lea, MN

Professional examinations, certifications and/or designations include:

- FINRA Securities examinations: Series 7 and 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 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.

To provide brokerage and insurance services, Matthew Stay is a registered representative of Mutual Securities, Inc of California, doing business as Mutual Securities, a registered broker dealer and member of FINRA. He is a licensed agent of multiple insurance companies.

For services provided by the affiliated intellicents investment solutions companies, the companies and Matthew Stay 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 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.

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

Matthew Stay 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 Matthew Stay should be forwarded to Mr. Nicholas Holmes as 800-880-4015.