

# Brandon T. Budd

intellicents investment solutions inc.

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

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

Brandon Budd born in 1988, received the following formal education after high school:

- 2006-2010 University of Kansas, Lawrence, KS - Finance

Business experience includes:

- May 2018 – Financial Consultant for intellicents investment solutions inc., Overland Park, KS
- June 2016 – May 2018 Regional Vice President of Transamerica Retirement Solutions., Kansas City, MO
- Aug 2014 – June 2016 Retirement Plan Consultant for The Standard, Kansas City, MO
- 2013 – 2014 DC/IO Internal Wholesaler for American Century Investments., Kansas City, MI

Professional examinations, certifications and/or designations include:

- FINRA Securities examinations: Series 65
- Life, Accident & Health License
- Accredited Investment Fiduciary® (“AIF®”)
- Retirement Income Certified Professional (“RICP®”)

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.

RICP® is a professional designation that requires all candidates have (1) at least three years of business experience in insurance and healthcare, financial services and employee benefits, or another related field; (2) complete a robust, multi-course program that covers a variety of topics including retirement income process, strategies, and solutions, sources of retirement income, and managing the retirement income plan; (3) upon completion of the education requirements, candidates must pass a 100-question, closed-book, proctored exam. The designees must complete three hours of approved continuing education every two years and must adhere to The American College Code of Ethics and Procedures.

## **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. Brandon Budd is a licensed agent of multiple insurance companies.

For services provided by the affiliated intellicents investment solutions companies, the companies and Brandon Budd 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**

Brandon Budd 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 Brandon Budd should be forwarded to Mr. Nicholas Holmes at 800-880-4015.