

# Paul D. Wick

intellicents investment solutions inc.  
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**This Brochure Supplement provides information about Paul D. Wick 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 Paul Wick is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

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

Paul Wick born in 1969, received the following formal education after high school:

- 1987 - 1991 Saint Cloud State University - B.S. Economics
- 1994 - 2001 University of Saint Thomas – MBA Concentration in Financial Management

Business experience includes:

- June 2012 – current Chief investment officer of intellicents investment solutions inc., Eden Prairie, MN
- August 2010 - June 2012 Head of External Manager Services – Galliard Capital Management, Minneapolis, MN
- May 1998 - August 2010 Jeffrey Slocum & Associates, Inc., Minneapolis, MN. Served In multiple roles during tenure including Senior Consultant, Director of Research Operations and Director of Fixed Income

Professional examinations, certifications and/or designations include:

- FINRA Securities examinations: Series 65
- Chartered Financial Analyst® (“CFA®“)

CFA® is a professional designation given by the CFA Institute (formerly AIMR) that measures the competence and integrity of financial analysts. Candidates must (1) hold an undergraduate degree and have four years of professional experience involving investment decision-making, or (2) have completed four years of qualified work experience (full time, but not necessarily investment related). Educational requirements is a self-study program which is 250 hours of study to pass three levels of exams covering areas such as accounting, economics, ethics, money\_management and security analysis.

## **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 is part of a consortium of companies that focus on providing employee benefit services to employers. The services include investment advisory services provided through intellicents investment solutions, 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 Paul Wick may receive consulting fees. 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 may receive “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**

Paul Wick is one of several supervised persons who gives general advice on behalf of intellicents investment solutions and are under the direct supervision of Mr. Nicholas Holmes, Chief Compliance Officer. Inquiries about Mr. Paul Wick should be forward to Mr. Nicholas Holmes at 800-880-4015.