

# Brian Forneris

intellicents investment solutions inc.

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**This Brochure Supplement provides information about Brian Forneris 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 Forneris 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 Forneris born in 1974, received the following formal education after high school:

- 1997-1999- Western Illinois University, Macomb, IL – B.S. Sociology

Business experience includes:

- October 2022- Current Financial Consultant, Amherst, OH
- March 2022-August 2022 Vice President F.N.B. Corporation Cleveland OH
- February 2019-March 2022 Regional Vice President of Sales Securian Financial Cleveland OH
- June 2013-February 2019 Retirement Plan Consultant The Standard Cleveland OH
- December 2005-June 2013 Retirement Plan Sales Principal Financial Group Cleveland OH

Professional examinations, certifications and/or designations include:

- FINRA Securities examinations: Series 65
- Life, Accident & Health license
- American Society of Pension Professionals and Actuaries Qualified 401(k) Administrator® (QKA®)
- The Chartered Retirement Plans Specialist<sup>SM</sup> (“CRPS®”)
- Accredited Investment Fiduciary® (“AIF®”)

ASPPA QKA® is The Qualified 401(k) Administrator credential offered for retirement plan professionals who work primarily with 401(k) plans. Applicants for the QKA® credentials are from various professional disciplines. They typically assist employers and consultants with the recordkeeping, non-discrimination testing and the administrative aspects of 401(k) and related defined contribution plans.

CRPS® is a professional designation awarded by the College for Financial Planning to individuals who specialize in creating, implementing and maintaining retirement plans for businesses. Recipients are required to pass an exam demonstrating their expertise. CRPS professionals must complete 16 hours of continuing education every two years and pay a nominal fee to continue using the designation.

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.

## Item 3- Disciplinary Information

intelligents 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. intelligents investment solutions 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 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. These services are provided through multiple companies..

For services provided by the affiliated intellicents investment solutions companies, the companies and Brian Forneris 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 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**

There are several supervised persons who give general advice on behalf of intellicents investment solutions inc. and are under the direct supervision of Mr. Nicholas Holmes. Inquiries about Mr. Brian Forneris should be forwarded to Mr. Nicholas Holmes at 800-880-4015.