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**Part 2B of Form ADV – Brochure Supplement**

*for*

**Dennis M. Pearlman**  
**CRD No. 4665022**

**Item 1 Cover Page**

**July 19, 2021**

This brochure supplement provides information about Dennis Pearlman that supplements the Everhart Advisors' firm Brochure. You should have received a copy of that Brochure. Please contact Steven Reinsel, Chief Compliance Officer, if you did not receive Everhart Advisors' Brochure, or if you have any questions about the content of this supplement. Additional information about Dennis Pearlman is available on the Securities and Exchange Commission's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

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

**Name:** Dennis M. Pearlman

**Born:** March 1960

**Title:** Senior Retirement Plan Consultant  
Investment Advisor Representative

**Education:** Bachelor of Arts in Finance and Accounting, 1983  
University of South Florida

**Licenses:** Series 65  
2-15 License – Florida Life, Health & Annuity Insurance

**Designations:** Accredited Investment Fiduciary (AIF<sup>®</sup>)  
Certified Plan Fiduciary Advisor (CPFA<sup>®</sup>)

### **Accredited Investment Fiduciary<sup>®</sup> (AIF<sup>®</sup>) Designation**

The AIF Designation certifies that the recipient has specialized knowledge of fiduciary standards of care and their application to the investment management process. To receive the AIF Designation, the individual must meet prerequisite criteria based on a combination of education, relevant industry experience, and/or ongoing professional development, complete a training program, successfully pass a comprehensive, closed-book final examination under the supervision of a proctor and agree to abide by the Code of Ethics and Conduct Standards. In order to maintain the AIF Designation, the individual must annually attest to the Code of Ethics and Conduct Standards and accrue and report a minimum of six hours of continuing education. The Designation is administered by the Center for Fiduciary Studies, the standards-setting body of fi360.

### **Certified Plan Fiduciary Advisor<sup>®</sup> (CPFA<sup>®</sup>)**

The CPFA Designation signifies that an individual has met initial and on-going requirements for the professional designation which focuses on providing the expertise required to act as a plan fiduciary and help plan sponsors manage their roles and responsibilities. Designees must pass a 70-question NAPA CPFA examination. To maintain the CPFA Designation, an individual must complete ten hours of continuing education each calendar year.

## Business Experience

Employer	Title	Dates
Everhart Advisors Dublin, OH	Senior Retirement Plan Consultant Investment Advisor Representative	07/2021 - Present
Case Pearlman Retirement Plan Advisors, LLC Fort Myers, FL	Managing Member/President Chief Compliance Officer	04/2011 – 06/2021
Case Pearlman Corporate Benefits, Inc. Fort Myers, FL	President Chief Compliance Officer	02/2003 – 03/2016
Triad Advisors	Registered Representative	10/2008 – 07/2011
Jefferson Pilot Securities	Registered Representative	05/2004 – 06/2008
Park Avenue Securities	Registered Representative	05/2003 – 05/2004

### Item 3 Disciplinary Information

### Item 4 Other Business Activities

Mr. Pearlman is a licensed independent insurance agent. He will receive the normal commissions associated with insurance sales. This creates an incentive for him to recommend, should you inquire, those products in which he will receive a commission. Consequently, the objectivity of the advice rendered could be subjective and create a disadvantage.

You are under no obligation to accept Mr. Pearlman's recommendation to purchase any insurance products. You are free to choose any independent insurance agent and insurance company to purchase your insurance. Regardless of the insurance agent from whom you select to purchase your insurance, he/she will earn the normal commission from the sale.

For more information about the potential conflicts of interest, see our Disclosure Brochure in Item 10, "Other Financial Industry Activities & Affiliations". Notwithstanding such potential conflicts of interest, we strive to act in your best interest and ensure disclosure is properly made to you in compliance with the Investment Adviser Act of 1940, Rule 275.206.

## **Item 5**      Additional Compensation

Mr. Pearlman does not receive any economic benefit from any person or entity for providing advisory services through Everhart Advisors other than compensation paid by the firm. Mr. Pearlman is paid a percentage of the fees received from clients to whom he is assigned and certain other clients.

## **Item 6**      Supervision

Mr. Pearlman is supervised by Steven Reinsel, Chief Compliance Officer of Everhart Advisors. Mr. Reinsel supervises all duties and activities of the firm's employees and investment advisor representatives and monitors compliance with the firm's policies and procedures and applicable laws and regulations. Mr. Reinsel's phone number is 614.717.9705.