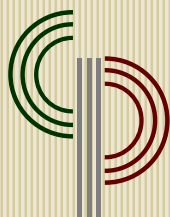


## FORM ADV: PART 2B

### BROCHURE SUPPLEMENT



# Case Pearlman Retirement Plan Advisors, LLC

12140 Carissa Commerce Court  
Suite 104  
Fort Myers, Florida 33966

Tel: 239.482.8002  
Fax: 239.482.8243

### SUPERVISION

**Dennis M. Pearlman**  
Chief Compliance Officer

Phone: 239.482.8002  
e-Mail: dennis@casepearlman.com

Mr. Pearlman oversees the supervision of all supervised persons and manages our compliance-related issues.

Duties include reviewing investment activities to ensure all supervised persons are acting in our clients' best interests in discharging their duties. Any activities that appear to be out of the ordinary are checked.

BROCHURE SUPPLEMENT  
DATED

1

**JANUARY  
2019**

This Brochure Supplement provides information about Gerald A. Fitzer that is an accompaniment to the Disclosure Brochure for our firm, Case Pearlman Retirement Plan Advisors, LLC. You should have received both of these together as a complete disclosure packet. If you did not receive our Disclosure Brochure, or if you should have questions about this Brochure Supplement for Mr. Fitzer, you are welcome to contact us. Our contact information is listed to the left.

Additional information about Case Pearlman Retirement Plan Advisors, LLC and Gerald A. Fitzer are also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Gerald (Gary) A. Fitzer, PPC®

CRD#: 846596

Year of Birth: 1954

### EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

#### Education

Mr. Fitzer attended Purdue University from 1973 to 1976 where he completed course work and earned credits towards a degree in Agricultural Economics but did not graduate. While working his way through Purdue, Mr. Fitzer raised 1,400 head of hogs spread over 3 local farms. His agribusiness success led him to leave Purdue in 1976 to form a Subchapter S corporation, for which he served as an operating officer, and purchased a membership seat on the Chicago Mercantile Exchange. In 1981, Mr. Fitzer went to work for Merrill Lynch managing investment relationships. His success has led to management opportunities for some large wire-houses and other financial service industry business ventures.

Designations: **Professional Plan Consultant® (PPC®)** - The PPC® designation requires one to have two (2) years experience, successfully completed course work and exams, and satisfy the Code of Ethics and Conduct Standards. In addition, annually complete six (6) hours of continuing education.

#### Licenses

FINRA Exams: Series 1 - Registered Representative Exam (Retired)  
Series 3 - National Commodity Futures Examination (Retired)  
Series 5 - Interest Rate Options Examination (Retired)  
Series 7 - General Securities Representative Examination (Retired)  
Series 8 - General Securities Sales Supervisor (Retired)  
Series 15 - Foreign Currency Options Examination (Retired)  
Series 63 - Uniform Securities Agent State Law Examination (Retired)  
Series 65 - Uniform Investment Adviser Law Examination (Active)

Insurance: Life, Health & Annuity Insurance (Retired)

#### Business Background

09/2012 - Present .....Case Pearlman Retirement Plan Advisors, LLC  
Position: Investment Advisor Representative  
10/2010 - 09/2012 .....The Law Offices of Walsh & deMontesquiou  
Position: Forensics and Litigation  
08/2010 - 09/2010 .....Novus Direct/The Law Offices of Charles Manly Oldham  
Position: Mortgage Counselor  
07/2009 - 07/2010 .....Neighborhood Assistance Corporation of America  
Position: Research Manager  
01/2009 - 06/2009 .....PHP Financial, LLC  
Position: Managing Member/Owner/Consultant  
07/2008 - 12/2008 .....Zacks Investment Management  
Position: Regional Vice President  
07/2006 - 06/2008 .....PHP Financial, LLC  
Position: Managing Member/Owner/Consultant

#### DISCIPLINARY INFORMATION

Mr. Fitzer has not been found to be the cause of, or been found to be involved in, any civil litigation, self-regulatory organization/administrative proceeding involving investment-related business activities at any time during the past ten years; or, personally ever been the subject of a criminal action.

#### OTHER BUSINESS ACTIVITIES

Mr. Fitzer is not involved in any other business activities. Full focus of his attention is directed to meeting your retirement planning needs.

#### ADDITIONAL COMPENSATION

Mr. Fitzer has not been the subject of any arbitration claim, civil litigation, self-regulatory organization/administrative proceeding, or bankruptcy petition at any time during the past ten years.

