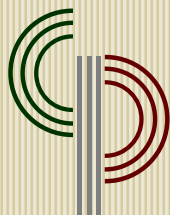


FORM ADV: PART 2B

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 James O. Lee 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. Lee, you are welcome to contact us. Our contact information is listed to the left.

Additional information about Case Pearlman Retirement Plan Advisors, LLC and James O. Lee are also available on the SEC's website at www.adviserinfo.sec.gov.

James O. Lee, AIF®

CRD#: 5820240

Year of Birth: 1958

EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Education

1980 - Western Kentucky University: Bachelor of Science in Economics and Political Science

Licenses

FINRA Exams: Series 6 - Investment Company and Variable Contracts Products Rep. (Retired)
Series 65 - Uniform Investment Advisor Law Examination (Active)

Insurance: 2-15 License - Florida Life, Health & Annuity Insurance (Retired)

Designations: **Accredited Investment Fiduciary® (AIF®)** - The AIF® designation requires one to successfully complete course work and exams and abide by a code of ethics. In addition, to maintain the AIF® designation, one is required to meet rigid standards and complete six (6) hours of continuing education every year.

Business Background

04/2011 - PresentCase Pearlman Retirement Plan Advisors, LLC
Position: Investment Advisor Representative
08/2009 - 03/2016Case Pearlman Corporate Benefits, Inc.
Position: Insurance Agent
07/2010 - 12/2011Triad Advisors, Inc.
Position: Registered Representative
06/2006 - 08/2009Retired
Position: Retired
12/1980 - 06/2006Procter & Gamble
Position: Sales Manager

DISCIPLINARY INFORMATION

Mr. Lee 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. Lee is not involved in any other business activities. Full focus of his attention is directed to meeting your financial and investment needs.

ADDITIONAL COMPENSATION

Mr. Lee 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.

