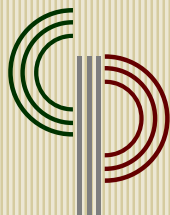


FORM ADV: PART 2B

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 Thomas D. Case 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. Case, you are welcome to contact us. Our contact information is listed to the left.

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

Thomas D. Case, Jr., ChFC®, CLU®, CPCU®, PPC®

CRD#: 1765158 Year of Birth: 1951

EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Education

1974 - Wake Forest University: Bachelor of Arts in Communications

Licenses

FINRA Exams: Series 6 - Investment Company and Variable Contracts Products Rep. (Retired) Series 63 - Uniform Securities Agent State Law Examination (Retired)

Insurance: 2-15 License - Florida Life, Health & Annuity Insurance (Active) 2-20 License - Florida Property & Casualty (Active)

Designations: Chartered Financial Consultant® (ChFC®) - The ChFC® designation requires one to have three (3) years experience, successfully completed course work and exams, and maintain ethical standards. In addition, to maintain the ChFC® designation, one is required to meet rigid standards.

Chartered Life Underwriter® (CLU®) - The CLU® designation requires one to have three (3) years experience, successfully completed course work and exams, and maintain ethical standards. In addition, to maintain the CLU® designation, one is required to meet rigid standards.

Chartered Property Casualty Underwriter (CPCU®) - The CPCU® designation requires one to have two (2) years experience, complete rigorous curriculum in post-secondary undergraduate and/or graduate-level courses and maintain ethical standards.

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.

Business Background

- 04/2011 - Present.....Case Pearlman Retirement Plan Advisors, LLC Position: Managing Member & Chief Executive Officer
02/2008 - Present.....Case Life Solutions, LLC Position: Insurance Agent
02/2003 - 03/2016Case Pearlman Corporate Benefits, Inc. Position: Chief Executive Officer - Principal
10/2008 - 12/2011Triad Advisors, Inc. Position: Registered Representative
05/2004 - 06/2008Jefferson Pilot Securities Position: Registered Representative
05/1999 - 05/2004Park Avenue Securities Position: Registered Representative

DISCIPLINARY INFORMATION

Mr. Case 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.

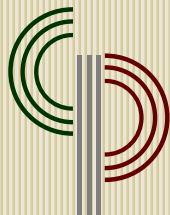
OTHER BUSINESS ACTIVITIES

Licensed Insurance Agent

Mr. Case 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. Case'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.





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Continuation of Information for:

Thomas D. Case, Jr., ChFC®, CLU®, CPCU®, PPC®

CRD#: 1765158

Year of Birth: 1951

CONTINUATION OF OTHER BUSINESS ACTIVITIES

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.

Financial Industry Affiliations

Mr. Case, in addition to serving as principal for the Company, Case Pearlman Retirement Plan Advisors, LLC, indirectly, through his wife Lynda Case, owns Case Life Solutions, LLC (Mrs. Case is the sole owner). Together, the Cases' ownership of Case Life Solutions creates a potential conflict of interest to the Company's fiduciary duty to be impartial with their advice and to keep your interests ahead of their own.

As control persons of both the Company and Case Life Solutions, Mr. and Mrs. Case are able to influence you to keep your retirement planning activities, corporate benefit plans, and life insurance needs in house. This in turn will lead to increased personal revenues in the form of advisory/consulting fees, salaries, bonuses, commissions, and income/dividend returns. Therefore, before accepting recommendations to engage an affiliated company for professional services, you should consider other options to ensure that the service from our affiliate, Case Life Solutions, is comparable or equivalent to the service you might receive from another independent firm.

ADDITIONAL COMPENSATION

Mr. Case 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.