

## Item 1: Cover Page Supervised Person Brochure

Part 2B of Form ADV

---

**Adam Simon**



**1600 Parkdale Road, Suite 201**

**Rochester, MI 48307**

**PHONE: 586-781-6900**

**WEBSITE: [www.cprinvestmentsinc.com](http://www.cprinvestmentsinc.com)**

This brochure provides information about Adam Simon and supplements the CPR Investments Inc. brochure. You should have received a copy of that brochure. Please contact Adam Simon if you did not receive CPR Investments Inc.'s brochure or if you have any questions about the contents of this supplement.

Additional information about Adam Simon (CRD #5663201) is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

November 2, 2020

---

**Brochure Supplement (Part 2B of Form ADV)****Supervised Person Brochure**

---

**Adam Simon**

- Year of birth: 1979

---

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

## Educational Background:

- Liberty Theological Seminary; Master's Degree, Theological Studies; 2013
- Macomb Community College; Associate's Degree, Firefighter/Paramedic Specialty

## Business Experience:

- CPR Investments Inc., Investment Advisor Representative, June 2017 to Present
- CPR Financial Group LLC, Insurance Agent/Solicitor, June 2017 to Present
- Ausdal Financial Partners, Registered Rep, June 2017 to Present
- Adam Simon, Sole Proprietor; Insurance Agent; June 2017 to Present
- Clinton Township Fire Dept., Firefighter, March 2005 to Present
- Woodside Bible Church, Teaching Team, October 2011 to Present
- HBW Advisory Services, Investment Advisor Rep, January 2010 to June 2017
- HBW Securities, Registered Representative, April 2015 to June 2017

---

**Item 3: Disciplinary Information**

*Criminal Action:* None to report.

*Administrative Proceedings:* None to report.

*Self-Regulatory Organization Proceedings:* None to report.

---

**Item 4: Other Business Activities Engaged In**

Adam Simon is also a licensed insurance agent and solicitor for CPR Financial Group LLC. Approximately 10% of Mr. Simon's time is spent in this practice. Mr. Simon is also a registered representative of Ausdal Financial Partners. Approximately 20% of his time is spent in this business. Mr. Simon is also licensed to sell property and casualty and medicare insurance as a sole proprietor, 10% of his time is spent in this business. From time to time, he will offer clients products and/or services from these activities.

This represents a conflict of interest because it gives an incentive to recommend products and services based on the commission received. This conflict is mitigated by the fact that Mr. Simon has a fiduciary responsibility to place the best interest of the client first and the clients are not required to purchase any products or services. Clients have the option to purchase these products or services through another insurance agent or broker dealer of their choosing.

Mr. Simon is also a full-time firefighter and part time teacher at a church. These do not create any conflict of interest.

---

**Item 5: Additional Compensation**

Adam Simon receives additional compensation as an insurance agent and registered representative as well as a firefighter. He does not receive any performance-based fees.

---

**Item 6: Supervision**

Adam Simon is supervised by Charles P Reinhold sole owner and operator of CPR Investments Inc. The services offered by Adam Simon will consider client's risk tolerance by using a questionnaire to determine Asset allocation and recommend models/strategies for investment planning based on the risk tolerance score results. Clients are reminded quarterly to update CPR Investments Inc. of any changes in their risk tolerance. Charles Reinhold monitors all model/strategies offered by CPR Investments Inc. on a regular basis.

Charles Reinhold can be reached at 800-213-1164.