

## Item 1: Cover Page Supervised Person Brochure

Part 2B of Form ADV

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**Bobby L. Burns, EA**



**2201 N. Collins St, Suite 148**

**Arlington, TX 76011**

**PHONE: 817-616-3733**

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

This brochure provides information about Bobby L. Burns and supplements the CPR Investments Inc. brochure. You should have received a copy of that brochure. Please contact Bobby Burns 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 Bobby Burns (CRD #6530300) is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

November 2, 2020

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

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**Bobby L. Burns, EA**

- Year of birth: 1950

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

- Devry University, Keller Graduate School of Management, Master's Degree, 2004
- University of Arkansas-Pine Bluff, Bachelor's Degree, 1971

**Business Experience:**

- CPR Investments Inc., Investment Advisor Representative, May 2018 to Present
- CPR Financial Group LLC, Insurance Agent, May 2018 to Present
- Transtax Associates, President, June 2003 to Present
- Inv Logistics Inc.; President/Financial Accountant, May 2003 to Present
- H.D. Vest Advisory Services, Inc., Investment Advisor Representative, September 2016 to May 2018
- HD Vest Investment Services, Registered Representative July 2015 to May 2018

**Professional Certifications:**

Bobby Burns has earned certifications and credentials that are required to be explained in further detail

**Enrolled Agent (EA):** Enrolled Agents are enrolled by the Internal Revenue Service and authorized to use the EA designation. EA enrollment requirements:

- Successful completion of the three-part IRS Special Enrollment Examination (SEE), or completion of five years of employment by the IRS in a position which regularly interpreted and applied the tax code and its regulations.
- Successfully pass the background check conducted by the IRS.

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**Item 3: Disciplinary Information**

*Criminal Action:* None to report.

*Administrative Proceedings:* None to report.

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

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

Bobby Burns is also a licensed insurance agent with CPR Financial Group LLC. Approximately 10% of Mr. Burns' time is spent in this practice. Mr. Burns is President of Inv Logistics Inc. and Transtax Associates, tax and accounting businesses. Approximately 75% of his time is spent in these businesses. 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. Burns 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 tax preparer/accountant of their choosing.

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**Item 5: Additional Compensation**

Bobby Burns receives additional compensation as an insurance agent, and tax preparer/accountant. He does not receive any performance-based fees.

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**Item 6: Supervision**

Bobby Burns is supervised by Charles P Reinhold sole owner and operator of CPR Investments Inc. The services offered by Bobby Burns 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.