

Item 1 Cover Page

SUPERVISED PERSON BROCHURE
FORM ADV PART 2B

Amy Hall CPFA®



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This brochure supplement provides information about Amy Hall and supplements the CPR Financial & Insurance Services, Inc.'s brochure. You should have received a copy of that brochure. Please contact Amy Hall if you did not receive the brochure or if you have any questions about the contents of this supplement.

Additional information about Amy Hall (CRD#6902608) is available on the SEC's website at www.adviserinfo.sec.gov.

AUGUST 20, 2026

Brochure Supplement (Part 2B of Form ADV)
Additional Investment Advisor Representative - Amy Hall

- Year of birth: 1975

Item 2 Educational Background and Business Experience

Educational Background:

- University of South Florida; BS – Business Administration, Accounting; 2000

Professional Certifications

Vincent Lombardo has earned certifications and credentials that are required to be explained in further detail.

Certified Plan Fiduciary Advisor (CPFA®): A designation currently offered and recognized by the National Association of Plan Advisors. The following requirements are to be completed by each designee:

- Pass the **NAPA CPFA® Examination** which consists of 70 multiple-choice questions within 2.5 hours.
- The CPFA® Coursework covers four key areas: ERISA Fiduciary Roles and Responsibilities, ERISA Fiduciary Oversight, ERISA Plan Investment Management and ERISA Plan Management.
- No specific experience level or education requirements.
- Must earn 10 CE hours per calendar year, starting the calendar year following when you earned the designation.
 - Each calendar year a minimum of four (4) hours of the annual ten (10) hour CE requirement must cover retirement plan (“Relevant Topics”) identified in this continuing education policy statement. In addition, a minimum of one (1) hour of CE credit earned annually must address professional ethics and the ARA’s Code of Professional Conduct (“Ethics”). The remaining five hours may be on any topic relevant to a NAPA member’s professional development (“Professional Development”) in the retirement field.
- Credential holders must also pay an annual credential maintenance fee of \$81 beginning January 1 following the year the CPFA®/QPFC Credential is earned. Credentials earned in December are deemed to be earned the in the following calendar year for purposes of this rule.

Business Experience:

- Investment Advisor Representative; CPR Financial & Insurance Services, Inc.; (01/2018 – Present)
- Accounting Manager; iConnectGreen; (08/2015 – Present)
- Independent Insurance Agent; (06/2017 – Present)
- Accountant; Merki & Associates; (08/2014 – 05/2015)
- Unemployed; (01/2014 – 07/2014)
- HR & Payroll; Zeppelin Systems USA; (09/2007 – 12/2013)

Item 3 Disciplinary Information

None to report.

Item 4 Other Business Activities

Amy Hall has other business activities as an insurance agent, accountant, and tax preparer. Approximately 25% of her time is spent in these activities. From time to time she offers clients products and/or services from these activities.

This represents a conflict of interest because it gives Amy Hall an incentive to recommend products and/or services based on the commission and/or fee amount received. This conflict is mitigated by disclosures, procedures, and the firm's Fiduciary obligation to place the best interest of the client first and the clients are not required to purchase any products or services. Clients have the right to purchase these products through another insurance agent or tax preparer of their choosing.

Item 5 Additional Compensation

Amy Hall receives additional compensation from as an insurance agent, accountant, and tax preparer but does not receive any performance based fees.

Ms. Hall may receive certain benefits from Gradient Investments, LLC (and/or its affiliated companies) based on achieving certain production thresholds. These thresholds are not based on the sale of any specific product or specific product type. These incentives include marketing assistance, access to technology, office support, and business trainings and trips. While some of these benefit the client, such as technology and training, some do not. This creates a conflict of interest because it gives an incentive to the representative to meet this threshold. This conflict is mitigated by disclosures, procedures and the firm's fiduciary obligation to place the best interest of the Client first. Clients are not required to use Gradient Investments, LLC or any of its affiliated companies.

Item 6 Supervision

Amy Hall is supervised by Charles P. Rosen, Owner/Chief Compliance Officer of CPR Financial & Insurance Services, Inc. Mr. Rosen reviews Amy Hall's work through client account reviews, quarterly personal transaction reports as well as face-to-face and phone interactions. Charles P. Rosen can be contacted by phone at 877-431-6997 or by email at chuck@cprfinancial.net.

Item 7 Requirements for State-Registered Advisors

Arbitration Claims: None to report.

Self-Regulatory Organization or Administrative Proceeding: None to report.

Bankruptcy Petition: None to report.