

Item 1 Cover Page

SUPERVISED PERSON BROCHURE
FORM ADV PART 2B

Amy Hall



Mailing Address:

5000 Eldorado Parkway, Ste. 150
Frisco, TX 75033

Physical Address:

2770 Main Street
Suite 266
Frisco, TX 75033

Tel: 877-431-6997

Fax: 877-624-1145

amy@cprfinancial.net

www.cprinsurance.com

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.

FEBRUARY 21, 2020

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

- Year of birth: 1975

Item 2 Educational Background and Business Experience

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)

Educational Background:

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

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.

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.