

# ***TRUADVICE, LLC***

## **RYAN RICHARD POTERACK INVESTMENT ADVISOR REPRESENTATIVE**

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## **FIRM SUPPLEMENTAL BROCHURE ADV PART 2B APRIL 7, 2020**

This Brochure Supplement provides information about Ryan Poterack that supplements TRUADVICE, LLC's firm brochure. You should have received a copy of that brochure. Please contact Christopher Sleight at 941-413-5390 if you did not receive TRUADVICE, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Ryan Poterack is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov). You can search this site by a unique identifying number, known as a CRD number. The CRD number for Ryan Poterack is 2065824.

## **Item 2 – Educational Background and Business Experience**

### **Ryan Poterack**

**Born:** 1966

**Education:** Iowa State University; Bachelor of Arts in Finance; 1990

### **Business Background:**

TRUADVISE, LLC; Investment Advisor Representative; from 06/2019 to Present

Poterack Capital Advisory, Inc; President and Insurance Agent; from 07/2001 to Present

Capital Asset Advisory Services, LLC; Investment Advisor Representative; from 08/2012 to 6/2019

## **Item 3 – Disciplinary Information**

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that could be material to your evaluation of each supervised person providing investment advice. Mr. Poterack has not had any legal or disciplinary events.

## **Item 4 – Other Business Activities**

### **A. Investment-Related Activities**

Mr. Poterack is the owner of Poterack Capital Advisory, Inc, through which he markets and administers insurance and financial services. Mr. Poterack is a licensed insurance agent and spends approximately 3-5 hours per week in this role. Mr. Poterack may recommend the use of Poterack Capital Advisory, Inc to clients in need of insurance. This activity pays Mr. Poterack a commission that is separate from the advisory fees outlined in the firm's ADV Part 2A, Item 5. The additional compensation creates a financial incentive to recommend and sell the services to the firm's clients. Mr. Poterack mitigates any conflicts of interest by acting in the client's best interest through his fiduciary duty and through the implementation of policies and procedures that address the conflict. Clients are never obligated or required to purchase insurance products from or through Mr. Poterack/Poterack Capital Advisory, Inc and may choose any independent insurance agent and insurance company to purchase insurance products.

Mr. Poterack is also the owner of PCA Advisor Network through which he speaks with and conducts presentations to other financial advisors.

### **B. Non-Investment-Related Activities**

Mr. Poterack owns an LLC doing business as Anytime Fitness Gym Franchise. Mr. Poterack spends one hour per month related to this business activity.

## **Item 5 – Additional Compensation**

In addition to the information noted in Item 4 above, Ryan Poterack can receive additional benefits. Certain product sponsors may provide Mr. Poterack with other economic benefits as a result of his recommendation or sale of the product sponsors' investments. The economic benefits received by Mr. Poterack from product sponsors can include but are not limited to, financial assistance or the sponsorship of conferences and educational sessions, marketing support, incentive awards, payment of travel expenses, and tools to assist Mr. Poterack in providing various services to clients. Although TRUADVICE and Mr. Poterack endeavor at all times to put the interest of its clients ahead of its own or those of its officers, directors, or representatives ("affiliated persons"), these arrangements could present a conflict of interest and could affect the judgment of Mr. Poterack when recommending investment products.

## **Item 6 – Supervision**

Mr. Poterack is supervised by Christopher Sleight, the firm's Chief Compliance Officer. Mr. Poterack is also bound by the firm's Code of Ethics and its policies and procedures. The firm's Chief Compliance Officer is primarily responsible for the implementation of the firm's policies and procedures and overseeing the activities of the firm's supervised persons. Should you have any questions regarding the firm's supervision or compliance practices, Mr. Sleight can be reached at 941-413-5390.