

# Kevin Earl Dulitz

intellicents investment solutions inc.

100 North Broadway  
Albert Lea, MN 56007  
[www.intellicents.com](http://www.intellicents.com)

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**This Brochure Supplement provides information about Kevin E. Dulitz that supplements the intellicents investment solutions inc. Brochure, a copy of which you should have received. Please contact our Director of Operations at 507-377-2919 if you did not receive intellicents investment solutions inc.'s Brochure or if you have any questions about the contents of this supplement. Additional information about Kevin Dulitz is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

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

Kevin Dulitz born in 1969, received the following formal education after high school:

- 1987-1991 Mankato State University, Mankato, MN - B.S. Business Administration

Business experience includes:

- 1996 – current Investment Consultant of intellicents investment solutions inc. (f/k/a ABG Investment Services, Inc.), Albert Lea, MN
- 1991 – current Consultant of intellicents inc. (f/k/a Alliance Benefit Group Financial Services Corp.), Albert Lea, MN

Professional examinations, certifications and/or designations include:

- FINRA Securities examinations: Series 6; Series 63; and Series 65
- Life, Accident & Health License
- The Chartered Retirement Plans Specialist<sup>SM</sup> (“CRPS<sup>®</sup>”)
- Accredited Investment Fiduciary<sup>®</sup> (“AIF<sup>®</sup>”)

CRPS<sup>®</sup> is a professional designation awarded by the College for Financial Planning to individuals who specialize in creating, implementing and maintaining retirement plans for businesses. Recipients are required to pass an exam demonstrating their expertise. CRPS professionals must complete 16 hours of continuing education every two years and pay a nominal fee to continue using the designation.

AIF<sup>®</sup> is a professional designation which includes one of the following combinations: (1) minimum of two year of relevant experience with a bachelor's degree (or higher) and a professional credential; (2) minimum of five years of relevant experience with a bachelor's degree (or higher) or a professional credential; (3) minimum of eight years of relevant experience. The remaining requirements are to enroll in and complete a training course, pass an examination and satisfy the Code of Ethics and Conduct Standards. The designees must accrue a minimum of six hours of continuing education annually.

## **Item 3- Disciplinary Information**

intellicents investment solutions inc. (“iis”) is required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. IIS has no information to disclose in relations to this item.

## **Item 4- Other Business Activities**

intellicents investment solutions inc. is part of a consortium of companies that focus on providing employee benefit services to employers. The services include investment advisory services provided through IIS, and through its affiliated companies: life, disability and health insurance services, and benefits consulting services that range from defined contribution retirement plans to employee wellness programs.

Insurance services are provided through intellicents inc. Kevin is a licensed agent of multiple insurance companies.

For services provided by the affiliated intellicents investment solutions companies, the companies and Kevin Dulitz may receive consulting fees and/or commissions on sales of any investment and insurance product sold to clients. iis may also provide investment advisory services to the clients of the affiliated intellicents investment solutions companies; however, iis never receives commissions on any assets under management for which iis receives advisory fees.

#### **Item 5- Additional Compensation**

Because of the nature and extent of the business intellicents investment solutions (iis and its affiliates) provides various custodians and mutual fund companies “revenue sharing” in the form of shareholder servicing fees, sub-transfer agency fees, 12b-1 fees and finders fees. These fees are fully disclosed to plan sponsors and participants, and are passed on by the custodian to the plan sponsor or to the plan for use in offsetting plan related fees.

#### **Item 6 - Supervision**

Kevin Dulitz is one of several persons who give general advice on behalf of intellicents investment solutions under the direct supervision of Mr. Nicholas Holmes. Inquiries about Mr. Kevin Dulitz should be forwarded to Mr. Nicholas Holmes as 800-880-4015.