

Retirement Plan Advisors, LLC

Form ADV Part 2B – Brochure Supplement

for

Timothy Rozelle

P.O. Box 98

Comstock Park, MI 49321

(616) 647-9932

trozelle@retirementplanadvisors.com

May 6, 2024

This brochure supplement provides information about Timothy Rozelle that supplements the Retirement Plan Advisors, LLC, Brochure. You should have received a copy of that brochure. Please contact our Service Center at (877) 284-6837 if you did not receive Retirement Plan Advisors' Brochure or if you have any questions about the contents of this supplement.

Additional information about Timothy Rozelle is available on the SEC's website at www.adviserinfo.sec.gov.

29 E. Madison St., Suite 500
Chicago, IL 60602
(312) 701-1100

www.retirementplanadvisors.com

Item 2: Educational Background and Business Experience

Timothy Rozelle is a Financial Advisor for Retirement Plan Advisors. Timothy provides retirement counseling and investment advice to individual plan participants, predominantly in the public sector.

Date of Birth: May 21, 1960

Education: Ferris State College in 1986 with a Bachelor of Science degree in Business

Designations: Life Underwriter Training Council Fellow (LUTCF): The LUTCF educational program includes required ethical training and five elective courses chosen from such topics as meeting client needs, serving personal markets, essentials of business insurance, annuities, long-term care, life insurance products, and retirement, investment, and estate planning. An LUTCF has studied the fundamental skills required for an insurance agent and must adhere to an ongoing ethical standard when serving clients.

Business *Investment Adviser Representative*

Background: Retirement Plan Advisors, LLC 2003 - present

Item 3: Disciplinary Information

Timothy Rozelle has not had:

- A) Any civil or criminal actions brought against him;
- B) Any administrative proceedings before the SEC, any other federal regulatory agency, or any foreign financial regulatory authority;
- C) Any proceedings before a self-regulatory organization; and
- D) Proceedings in which a professional attainment, designation, or license was revoked or suspended.

Item 4: Other Business Activities

Timothy Rozelle, your Advisor, is also a registered representative with Cambridge Investment Research, Inc., ("Cambridge") a registered securities broker/dealer, member of the Financial Industry Regulatory Authority (FINRA) and the Securities Investors Protection Corporation

(SIPC). When acting as a registered representative of Cambridge, your Advisor may sell, for commissions, general securities products such as mutual funds, UIT's, variable annuities, and variable life products to advisory clients. Clients are not obliged to purchase or sell securities through Cambridge or their Advisor. However, if you choose to establish an account with your Advisor, it is important to understand that due to regulatory constraints, your Advisor must place all purchases and sales of securities products in commission-based accounts through Cambridge or other institutions approved by Cambridge.

Additionally, Timothy Rozelle is independently licensed to sell insurance and annuity products through various insurance companies. When acting in this capacity, your Advisor will receive commissions for selling insurance and annuity products. Clients may choose any independent insurance agent and insurance company to purchase insurance products and are not obligated to purchase insurance products through your Advisor.

Item 5: Additional Compensation

Timothy Rozelle may receive cash or non-cash compensation, such as merchandise, gifts, technology, travel expenses, and lodging, directly from investment managers or sponsors. These economic benefits could influence your IAR to recommend certain products/programs over others.

However, he does not receive any economic benefit from other persons, companies or organizations in exchange for providing client advisory services through Retirement Plan Advisors, LLC.

RPA is committed to always acting in the best interest of our clients.

Item 6: Supervision

Accounts are randomly and periodically reviewed for consistency between the investment objectives and risk tolerance as represented on the client's advisory account agreement or other suitability document, and the actual holdings in the client's account. Compliance may either sample investment management accounts on a periodic basis or review exception reports to determine if the client's investment allocations are consistent with the client's stated investment objective.

Matt Frank, Chief Compliance Officer, (573) 659-4443, is responsible for supervising the advisory activities of Timothy Rozelle on behalf of Retirement Plan Advisors, LLC.