

# **Retirement Plan Advisors, LLC**

#### Form ADV Part 2B – Brochure Supplement

for

## **Nathan Sonnier**

## 29. E Madison St., Suite 500

# Chicago, IL 60602

# (312) 701-1100

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### February 7, 2025

This brochure supplement provides information about Nathan Sonnier 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 Nathan Sonnier is available on the SEC's website at <u>www.adviserinfo.sec.gov</u>.

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

#### Item 2: Educational Background and Business Experience

Nathan Sonnier is a Sales Support Specialist for Retirement Plan Advisors. Nathan actively participates in RPA's business development and relationship management initiatives supporting the firm's client base of Group Retirement Plans.

Date of Birth:	April 13, 1995	
Education:	Master of Business Administration from New York University, Stern School of Business, New York, New York	
	Bachelor of Science degree in Public Health and Minor in Business from Indiana University, Bloomington, Indiana	
Business Background:	Investment Adviser Representative Retirement Plan Advisors, LLC	Feb. 2025 – Present
	<i>Sales Support Specialist</i> Retirement Plan Advisors, LLC	Aug. 2024 – Present
	Unemployed	May 2023 – Aug. 2024
	<i>Student</i> NYU Stern School of Business	Nov. 2022 – May 2023
	Investment Management Sales Associate Morgan Stanley Investment Management	March 2022– Nov. 2022
	<i>Vice President, Client Growth</i> Guidepoint	July 2021– March 2022
	Associate Vice President, Client Growth Guidepoint	Nov. 2020– July 2021
	<i>Senior Business Development Associate</i> Guidepoint	March 2020– Nov. 2020
	<i>Business Development Associate</i> Guidepoint	March 2019– March 2020

Nathan Sonnier 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- D) Proceedings in which a professional attainment, designation, or license was revoked or suspended.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

Nathan Sonnier, 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 stocks, bonds, mutual funds, exchange-traded funds, and variable annuity 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.

#### Item 5: Additional Compensation

Nathan Sonnier 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.

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 Nathan Sonnier on behalf of Retirement Plan Advisors, LLC.