# **Brochure Supplement**

March 6, 2024

RPR Financial Advisors LLC dba RPR Financial dba RPR CPAs & Advisors

SEC No. 801-122608

Craig S. Fisch, CRPC®

President & Wealth Manager
Individual CRD No. 1538511

8575 W. 110th St, Ste. 314

Overland Park, KS 66210

phone: 913-274-1452

email: cfisch@rprwealth.com website: www.rprfinancial.com

This brochure supplement provides information about Craig S. Fisch that supplements the RPR Financial brochure. You should have received a copy of that brochure. If you did not receive an RPR Financial brochure or if you have any questions about the contents of this supplement, please contact us at 913-274-1452.

Additional information about Craig S. Fisch is available on the SEC's website at www.adviserinfo.sec.gov.

### Item 2: Educational Background and Business Experience

Craig S, Fisch, CRPC® (b. 1958) is the President and a Wealth Manager of RPR Financial.

#### A. Educational Background

Bachelor of Science in Mass Communications, Lamar University 1980

#### **B.** Business Background

President & Wealth Manager, RPR Financial 10/2021–Present Investment Advisor Representative, IHT Wealth Management, LLC dba RPR Financial Registered Representative, LPL Financial LLC 12/2012–12/2017 Investment Adviser Representative, Personal Financial Group 12/2012–10/2017

#### C. Professional Designations

### **Chartered Retirement Planning Counselor**<sup>SM</sup> (CRPC®)

The Chartered Retirement Planning Counselor<sup>SM</sup> (CRPC®) program is offered through the College for Financial Planning® and focuses on the pre- and post-retirement needs of individuals, asset management, estate planning, and the entire retirement planning process using models and techniques from real client situations. Candidates must pass an end-of-course, multiple-choice examination that tests their ability to synthesize complex concepts and apply theoretical concepts to real-life situations. Candidates must sign and return the Code of Ethics, which includes agreeing to abide by the Standards of Professional Conduct and Terms and Conditions. Every two years individuals must renew their right to continue using the CRPC designation by completing 16 hours of continuing education.

## Item 3: Disciplinary Information

Craig Fisch does not have any disciplinary action to report. Public information concerning Craig Fisch's registration as an investment advisor representative may be found by accessing the SEC's public disclosure site at www.adviserinfo.sec.gov.

#### Item 4: Other Business Activities

Craig Fisch is a licensed insurance agent with Advisors Excel, an independent insurance agency. Please be advised that there is a potential conflict of interest in that there is an economic incentive to recommend insurance and other investment products offered through Advisors Excel. Please also be advised that Mr. Fisch strives to put his clients' interests first and foremost, and clients are not obligated to purchase insurance products through Advisors Excel.

Craig Fisch is a member of the Johnson County Referral Group for business owners.

### Item 5: Additional Compensation

Craig Fisch may receive additional compensation through his business activities described in Item 4 above.

### Item 6: Supervision

Supervision of Craig Fisch is performed by Mitch Carlson, Vice President, through reviews of internal transaction and security holdings reports, electronic and physical correspondence, and other internal reports as mandated by the firm and its regulatory authorities. Mr. Carlson can be reached at 913-274-1452.