

JUAN CARLOS COLLAR, CFP®, CIMA®

ANTHONY FERNANDEZ



ITEM 1. COVER PAGE

QUANTUM FAMILY OFFICE GROUP, LLC FORM ADV PART 2B BROCHURE SUPPLEMENT

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PURPOSE OF THE BROCHURE SUPPLEMENT:

This **Brochure Supplement** provides information about Juan C. Collar and Anthony Fernandez that supplements Quantum Family Office's **Firm Brochure**. You should have received a copy of that **Firm Brochure**. Please contact us if you did not receive Quantum Family Office's Brochure or if you have any questions about the content of this supplement.

Additional information about Juan Carlos Collar and Anthony Fernandez is available on the SEC's website at www.advisoinfo.sec.gov.

ITEM 2. EDUCATIONAL BACKGROUND & BUSINESS EXPERIENCE

JUAN CARLOS COLLAR, CFP®, CIMA®

Born 1969

Post-Secondary Education:

**University of Pennsylvania, The Wharton School of Business – 2006,
IMCA Investment Strategist Certificate Program**

**University of Pennsylvania, The Wharton School of Business – 2004,
IMCA Certified Investment Management Analyst Program**

The CIMA certification signifies that an individual has met initial and on-going experience, ethical, education, and examination requirements for investment management consulting, including advanced investment management theory and application. Prerequisites for the CIMA certification are three years of financial services experience and an acceptable regulatory history. To obtain the CIMA certification, candidates must pass an online Qualification Examination, successfully complete a one-week classroom education program provided by a Registered Education Provider at an AACSB accredited university business school, pass an online Certification Examination, and have an acceptable regulatory history as evidenced by FINRA Form U-4 or other regulatory requirements. CIMA designees are required to adhere to IMCA's *Code of Professional Responsibility, Standards of Practice, and Rules and Guidelines for Use of the Marks*. CIMA designees must report 40 hours of continuing education credits, including two ethics hours, every two years to maintain the certification. The designation is administered through Investment Management Consultants Association (IMCA).

The CIMA certification has earned ANSI® (American National Standards Institute) accreditation under the personnel certification program. The American National Standards Institute, or ANSI, is a private non-profit organization that facilitates standardization and conformity assessment activities in the United States. CIMA is the first financial services credential to meet this international standard for personnel certification.

Gulf Coast University – 2002, Certified Financial Planner®

The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP (with flame design) marks (collectively, the "CFP® marks") are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board").

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients. Currently, more than 62,000 individuals have obtained CFP® certification in the United States.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- Education – Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board's studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a Bachelor's Degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP Board's financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;
- Examination – Pass the comprehensive CFP® Certification Examination. The examination, administered in 10 hours over a two-day period, includes case studies and client scenarios designed to test one's ability to correctly diagnose financial planning issues and apply one's knowledge of financial planning to real world circumstances;
- Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
- Ethics – Agree to be bound by CFP Board's *Standards of Professional Conduct*, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- Continuing Education – Complete 30 hours of continuing education hours every two years, including two hours on the *Code of Ethics* and other parts of the *Standards of Professional Conduct*, to maintain competence and keep up with developments in the financial planning field; and
- Ethics – Renew an agreement to be bound by the *Standards of Professional Conduct*. The *Standards* prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board’s enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

Florida International University – 1992, Business Administration, Finance

Recent Business Background:

Quantum Family Office Group, LLC, Executive Director, 2005 – Present

Merrill Lynch, Pierce, Fenner & Smith Incorporated,
Vice President / Wealth Management Advisor, 1995 – 2005

ANTHONY FERNANDEZ

Born 1974

Post-Secondary Education:

**Florida International University – 1996,
Business Administration, Marketing**

Recent Business Background:

Quantum Family Office Group, LLC, Managing Director, 2005 – Present

Merrill Lynch, Pierce, Fenner & Smith Incorporated,
Assistant Vice President/Business Financial Advisor, 1998 –2005

ITEM 3. DISCIPLINARY INFORMATION

Neither Juan Carlos Collar nor Anthony Fernandez has had any legal or disciplinary information to report in the past.

ITEM 4. OTHER BUSINESS ACTIVITIES

Neither Juan Carlos Collar nor Anthony Fernandez engaged in any other investment-related activities or other business for compensation.

ITEM 5. ADDITIONAL COMPENSATION

Neither Juan Carlos Collar nor Anthony Fernandez receives additional compensation for providing advisory services.

ITEM 6. SUPERVISION

Mr. Collar serves as the Chief Executive and Chief Investment Officer of Quantum Family Office. He oversees the general business and strategic aspects of the firm. He is also responsible for setting the general parameters for the investment advice to be provided to the firm's clients.

Mr. Fernandez serves as the Managing Director of Quantum Family Office. His primary focus is to advise clients about the alternative investment sector of the capital markets.

Juan Carlos Collar, CFP[®], CIMA[®], Executive Director 305-740-2508
Anthony Fernandez, Managing Director 305-740-2508

ITEM 7. REQUIREMENTS FOR STATE-REGISTERED ADVISER

Quantum Family Office would be required to disclose additional information for Juan Carlos Collar and Anthony Fernandez if either had ever been the subject of a bankruptcy petition or even been found liable in either: (a) an arbitration; or (b) a civil, self regulatory organization, or administrative proceeding. As none of these apply to either Juan Carlos Collar or Anthony Fernandez, Quantum Family Office has no information to disclose in this regard.