

**Item 1: Cover Page for Part 2B of Form ADV:  
Brochure Supplement  
May 2014**

**Thomas Gerson**

**Blair Hall Advisors, LLC  
1562 First Avenue, Suite 302  
New York, NY 10028**

**Firm Contact:  
Thomas Gerson  
Chief Compliance Officer**

**Firm Website Address:  
[www.BlairHallAdvisors.com](http://www.BlairHallAdvisors.com)**

This brochure supplement provides information about Thomas Gerson that supplements our brochure. You should have received a copy of that brochure. Please contact Mr. Gerson if you did not receive Blair Hall Advisors, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Thomas Gerson is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2: Educational Background & Business Experience

**Thomas Gerson**

**Year of Birth:** 1967

### **Educational Background:**

- 1989; Princeton University, Woodrow Wilson School of Public and International Affairs; Bachelor of Arts, Summa Cum Laude
- 1996; Stanford University, Graduate School of Business; MBA

### **Business Background:**

- 02/2014 – Present Blair Hall Advisors, LLC; Managing Member and CCO
- 03/2012 – 02/2014 Bank of America; Financial Advisor
- 02/2012 – 02/2014 Merrill Lynch; Financial Advisor
- 05/2010 – 02/2012 Morgan Stanley Smith Barney; Financial Advisor
- 07/2009 – 05/2010 North Western Mutual Investment Services, LLC; Registered Representative and Financial Representative
- 07/2009 – 05/2010 North Western Mutual Life Insurance Company; Financial Representative
- 08/2008 – 02/2009 Amazon.com; Director

### **Exams, Licenses & Other Professional Designations:**

- 08/2009 – Series 7 Exam
- 09/2009 – Series 66 Exam
- 09/2010 – Series 31 Exam

### **CIMA - Certified Investment Management Analyst:**

The CIMA certification signifies that an individual has met initial and on-going experience, ethical, education, and examination requirements for investment management consulting. 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, and pass an online Certification Examination. 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).

### **CRPC - Chartered Retirement Planning Counselor:**

The Chartered Retirement Planning Counsel designation or (CRPC) is offered by The College for Financial Planning®. The CRPC Program focuses on the pre- and post-retirement needs of individuals.

Enrollment in the program guides you through the retirement process, addressing issues such as estate planning and asset management. The College for Financial Planning® awards the Chartered Retirement Planning Counselor<sup>SM</sup> and CRPC® designation to students who: successfully complete the program; pass the final examination; and comply with the Code of Ethics, which includes

agreeing to abide by the Standards of Professional Conduct promulgated by The College for Financial Planning®.

Applicants must also disclose of any criminal, civil, self-regulatory organization, or governmental agency inquiry, investigation, or proceeding relating to their professional or business conduct. Conferment of the designation is contingent upon the College for Financial Planning's review of matters either self-disclosed or which are discovered by the College that are required to be disclosed.

Successful students receive a certificate and are granted the right to use the designation on correspondence and business cards for a two-year period. Continued use of the CRPC® designation is subject to ongoing renewal requirements. Every two years individuals must renew their right to continue using the CRPC® designation by: completing 16 hours of continuing education and reaffirming to abide by the Standards of Professional Conduct, Terms and Conditions, and self disclose any criminal, civil, self-regulatory organization, or governmental agency inquiry, investigation, or proceeding relating to their professional or business conduct.

### **Item 3: Disciplinary Information**

There are no legal or disciplinary events that are material to your evaluation of Mr. Gerson.

### **Item 4: Other Business Activities**

Mr. Gerson is licensed to sell insurance products. He may offer insurance products or refer clients to other insurance providers and receive normal and customary fees as a result of insurance sales. A conflict of interest may arise as these insurance sales may create an incentive to recommend products based on the compensation he or our supervised persons may earn. Clients are under no obligation to purchase insurance per Mr. Gerson's recommendations.

### **Item 5: Additional Compensation**

We have nothing to disclose in this regard.

### **Item 6: Supervision**

Mr. Gerson is the sole principal and Chief Compliance Officer and as such has no internal supervision placed over him. He is, however, bound by our firm's Code of Ethics.

### **Item 7: Requirements for State-Registered Advisers**

Mr. Gerson has not been involved in any arbitration claim alleging damages in excess of \$2,500. Furthermore, he has neither been involved in nor found liable in any civil, self-regulatory organization, or administrative proceeding nor has been the subject of any bankruptcy petitions.