

Brochure Supplement (Part 2B of Form ADV)

Education and Business Standards

PremierSource requires that [investment adviser representatives](#) in its employment have a bachelor's degree and further coursework demonstrating knowledge of financial planning and tax planning. Examples of acceptable coursework include: an MBA, a CFP®, a CFA, a ChFC, JD, CTFA, IAR, EA or CPA. Additionally, [investment adviser representatives](#) must have work experience that demonstrates their aptitude for retirement plan investment advisory support.

Professional Certifications

[Investment adviser representatives](#) have earned certifications and credentials that are required to be explained in further detail.

Certified Financial Planner (CFP): Certified Financial Planners are licensed by the CFP Board to use the CFP mark. CFP certification requirements:

- Bachelor's degree from an accredited college or university.
- Completion of the financial planning education requirements set by the CFP Board (www.cfp.net).
- Successful completion of the 10-hour CFP® Certification Exam.
- Three-year qualifying full-time work experience.
- Successfully pass the Candidate Fitness Standards and background check.

Chartered Financial Analyst (CFA): Chartered Financial Analysts are licensed by the CFA Institute to use the CFA mark. CFA certification requirements:

- Hold a bachelor's degree from an accredited institution or have equivalent education or work experience.
- Successful completion of all three exam levels of the CFA Program.
- Have 48 months of acceptable professional work experience in the investment decision-making process.
- Fulfill society requirements, which vary by society. Unless you are upgrading from affiliate membership, all societies require two sponsor statements as part of each application; these are submitted online by your sponsors.
- Agree to adhere to and sign the Member's Agreement, a Professional Conduct Statement, and any additional documentation requested by CFA Institute.

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Certified Investment Management Analyst (CIMA): Certified Investment Management Analysts are licensed by the IMCA to use the CIMA mark. CIMA certification requirements:

- Requires that candidates meet all eligibility requirements, including experience, education, examination, and ethics.
- Candidates must demonstrate a minimum of three years of client-centered financial services experience and complete five steps to earn the certification:
 - Submit application, fee, and pass background check;
 - Pass online Qualification Examination;
 - Complete education program with Registered Education Provider;
 - Pass online Certification Examination; and
 - Sign licensing agreement

Enrolled Agent (EA): Enrolled Agents are enrolled by the Internal Revenue Service and authorized to use the EA designation. EA enrollment requirements:

- Successful completion of the three-part IRS Special Enrollment Examination (SEE), or completion of five years of employment by the IRS in a position which regularly interpreted and applied the tax code and its regulations.
- Successfully pass the background check conducted by the IRS.

TEAH CORLEY, SPHR, IAR

Educational Background:

- Institutions:
 - Oklahoma State University, Stillwater, OK: 1987-1989
 - Pension Publications of Denver School of Qualified Plans: 1996
 - Cameron University, Lawton, OK: BA – 1997
 - Cannon Financial Institute at Pepperdine University, Malibu, CA: 1998, 1999

Business Experience:

- Oklahoma Insurance Department (08/89-10/90)
- The Sheridan Group Private Investment Company (05/92-11/94)
 - Investor Relations
- City National Bank (8/95-9/97)
 - Trust Department
- BancFirst Trust and Investment Management (10/97-04/03)

- Executive Vice President | Trust Officer
- PremierSource (04/03-Present)
 - Co-Founder | CEO

Disciplinary Information: None

Other Business Activities: None

Additional Compensation: None

Supervision:

Teah Corley is supervised by Richard Nix, Chairman of the Board. He reviews Teah's work through frequent office interactions as well as remote interactions. He also reviews Teah's activities through our client relationship management system. His contact information follows:

Richard Nix, Chairman of the Board
405-235-9621
richard.nix@mcafeetaft.com