

*This brochure supplement provides information about George Kegerreis that supplements the Zimmermann Investment Management & Planning brochure. You should have received a copy of that brochure. Please contact George Kegerreis if you did not receive Zimmermann Investment Management & Planning's brochure or if you have any questions about the contents of this supplement.*

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

# **Zimmermann Investment Management & Planning**

**Form ADV Part 2B – Individual Disclosure Brochure**

*for*

**George Kegerreis**

Personal CRD Number: 6143313

Investment Adviser Representative

Zimmermann Investment Management & Planning

502 Bridge Street

New Cumberland, PA 17070

(570) 332-5965

Keg5175@aol.com

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## Item 2: Educational Background and Business Experience

**Name:** George Kegerreis

**Born:** 1963

### **Educational Background and Professional Designations:**

#### **Education:**

Bachelor of Science Business, Pennsylvania State University - 1985

#### **Business Background:**

04/2019 - Present	Investment Adviser Representative Zimmermann Investment Management & Planning
03/2013 - Present	Investment Advisor Representative Professional Financial Advisors, Inc.
03/2013 - Present	Registered Representative PFA Security Asset Management, Inc.
06/2012 - 03/2013	Pensioner Commonwealth of PA
02/1986 - 06/2012	Sergeant Pennsylvania State Police

## Item 3: Disciplinary Information

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

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

George Kegerreis is a registered representative. From time to time, he will offer clients advice or products from this activity. Clients should be aware that these services pay a commission and involve a possible conflict of interest, as commissionable products can conflict with the fiduciary duties of a registered investment adviser. Zimmermann Investment Management & Planning always acts in the best interest of the client; including in the sale of commissionable products to advisory clients. Clients are in no way required to utilize the services any representative of Zimmermann Investment Management & Planning in such individual's outside capacity.

George Kegerreis is a licensed insurance agent. From time to time, he will offer clients advice or products from this activity. Clients should be aware that these services pay a commission and involve a possible conflict of interest, as commissionable products can conflict with the fiduciary duties of a registered investment adviser. Zimmermann Investment Management & Planning always acts in the best interest of the client; including in the sale of commissionable products to advisory clients. Clients are in no way required to implement the plan through any representative of Zimmermann Investment Management & Planning in their capacity as a licensed insurance agent.

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

George Kegerreis does not receive any economic benefit from any person, company, or organization, other than Zimmermann Investment Management & Planning in exchange for providing clients advisory services through Zimmermann Investment Management & Planning.

#### **Item 6: Supervision**

As a representative of Zimmermann Investment Management & Planning, George Kegerreis is supervised by Curt H Zimmermann, the firm's Chief Compliance Officer. Curt H Zimmermann is responsible for ensuring that George Kegerreis adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Curt H Zimmermann is (717) 439-3089.