

**Part 2B of Form ADV: *Brochure Supplement***

ROBERT LEWIS LEE  
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Girard Securities, Inc.  
9560 Waples Street  
San Diego, CA 92121

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This brochure supplement provides information about ROBERT LEWIS LEE that supplements the Girard Securities, Inc. brochure. You should have received a copy of that brochure. Please contact Patti Kuhlman 858-622-2140 if you did not receive Girard Securities, Inc.'s brochure or if you have any questions about the contents of this supplement.

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

## **Item 2 Educational Background and Business Experience**

**Full Legal Name:** ROBERT LEWIS LEE

**Born:** 1962

### **Education**

- St. Petersburg College; AA, Business; 1984
- Wharton School of Business; CIMA; 1991
- Florida Institute of Technology; CFP; 1998
- American College; CHFC; 2005

### **Business Experience**

- LEE FINANCIAL & RETIREMENT SERVICES; VICE PRESIDENT; from 1/1985 to 7/2007
- RETIREMENT MONEY MANAGEMENT; President and CEO from 1/2007 to 12/2008
- REGISTERED INVESTMENT ADVISOR; from 1/1985 to 12/2008
- RAYMOND JAMES FINANCIAL SERVICES, INC.; REGISTERED REPRESENTATIVE; from 6/1983 to 5/2007
- LEE & LEE PARTNERSHIP; PARTNER; from 1/1985 to 7/2007
- REGISTERED INVESTMENT ADVISOR; ADVISOR; from 6/2005 to Present
- RETIREMENT MONEY MANAGEMENT OF SARASOTA; PRESIDENT; from 12/2008 to Present
- REGISTERED INVESTMENT ADVISOR; ADVISOR; from 12/2008 to Present
- GIRARD SECURITIES, INC.; REGISTERED REPRESENTATIVE; from 5/2007 to Present
- SUCCESSFUL MONEY MANAGEMENT OF SARASOTA; PRESIDENT; from 7/2007 to Present
- LEE FINANCIAL OF SARASOTA, INC.; PRESIDENT; from 7/2007 to Present

### **Designations**

ROBERT LEWIS LEE has earned the following designation(s) and is in good

standing with the granting authority:

- Certified Investment Management Analyst; Wharton School of Business; 1991
- Certified Financial Planner; Certified Financial Planning Board; 1998
- Chartered Financial Consultant; American College; 2005

### **Item 3 Disciplinary Information**

ROBERT LEWIS LEE has no reportable disciplinary history.

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

#### **A. Investment-Related Activities**

1. ROBERT LEWIS LEE is also engaged in the following investment-related activities:

**Registered representative of a broker-dealer**

**Another investment adviser or financial planner**

As a registered representative of Girard Securities, Inc. commissions may be received from the sale of securities.

#### **B. Non Investment-Related Activities**

ROBERT LEWIS LEE is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of his time.

### **Item 5 Additional Compensation**

ROBERT LEWIS LEE does not receive any economic benefit from a non-advisory client for the provision of advisory services.

### **Item 6 Supervision**

**Supervisor:** Traci Sherrod

**Title:** Regional OSJ Manager

**Phone Number:** 858-622-2140