

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

**ROBERT LEWIS LEE**

Retirement Money Management  
2 North Tamiami Trail, Suite 400  
Sarasota, FL 34236  
Telephone: 941-955-8163  
Email: [robert.lee@gsirep.com](mailto:robert.lee@gsirep.com)

11/27/2017

This brochure supplement provides information about ROBERT LEWIS LEE that supplements the Retirement Money Management Firm Brochure. You should have received a copy of that brochure. Please contact Robert Lee if you did not receive Retirement Money Management's Firm Brochure or if you have any questions about the contents of this Brochure 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

\*Designations are no longer current with the granting authorities.

### **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
- LEE FINANCIAL OF SARASOTA, INC.; PRESIDENT; from 7/2007 to 7/2013
- REGISTERED INVESTMENT ADVISOR; ADVISOR; from 6/2005 to Present
- RETIREMENT MONEY MANAGEMENT OF SARASOTA; PRESIDENT; from  
12/2008 to Present
- GIRARD SECURITIES, INC.; REGISTERED REPRESENTATIVE; from  
5/2007 to 11/2017
- CETERA ADVISOR NETWORKS LLC; REGISTERED REPRESENTATIVE;  
from 10/2017 to Present
- SUCCESSFUL MONEY MANAGEMENT OF SARASOTA; PRESIDENT; from  
7/2007 to Present

### **Item 3 Disciplinary Information**

ROBERT LEWIS LEE has no reportable disciplinary history.

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

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

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

##### **Registered representative of a broker-dealer**

Robert Lee is a registered representative with Cetera Advisor Networks LLC ("Cetera"), a registered broker-dealer and member of FINRA. In such capacity, Mr. Lee sells securities through Cetera and receives normal and customary commissions and other types of compensation, for example, mutual fund 12b-1 fees or variable annuity trails. The potential for receipt of commissions and other compensation when Mr. Lee acts as a registered representative creates an incentive to recommend investment products based on the compensation received, rather than the client's needs. However, Mr. Lee may only recommend securities and insurance products that he believes are suitable for clients.

#### **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:** Jay LaBarre

**Title:** Financial Planner/Principal

**Phone Number:** 941-955-2099

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

ROBERT LEWIS LEE has never been the subject of a bankruptcy petition.

In 2004, Mr. Lee was involved in customer complaint that went to arbitration (NASD #04-04419) and was settled. The claims against Mr. Lee were dismissed as part of the settlement.