

Brett D. Anderson  
Michael T. Stillman  
Gordon L. Peterson



2301 Cedar Springs, Ste. 150  
Dallas, TX 75201  
214-754-0770  
[www.IntlResearch.com](http://www.IntlResearch.com)

March 26, 2019

**FORM ADV PART 2B  
BROCHURE SUPPLEMENT**

**This Brochure Supplement provides information about Brett D. Anderson, Michael T. Stillman, and Gordon L. Peterson, which supplements the International Research & Asset Management, Inc., (“International”) Brochure. You should have received a copy of that Brochure. Please contact Sheri Nelson if you did not receive International’s Brochure or if you have any questions about the contents of this supplement.**

**Additional information about the individuals above is available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

## **Educational Background and Business Experience**

---

### **Brett D. Anderson, CRPC®**

Born 1969

#### *Post-Secondary Education:*

University of Alabama – 1991, BA

#### *Recent Business Background:*

International Research & Asset Management, Inc., COO/CCO 12/2007 – Present

International Research Securities, Inc., Registered Representative 12/2007 - Present

True North Advisors, LLC, Relationship Manager 7/2004 – 12/2007

Charles Schwab & Co., Inc., Private Client Manager 09/2001 – 07/2004

Anderson Partners, LP, Managing Partner 10/1997 – 09/2001

The CRPC Program focuses on the pre- and post-retirement needs of individuals, transforming the retirement planning process into a positive experience. Enrollment in the program covers a variety of principles in the retirement planning field. The program covers the retirement process from start to finish, 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 and Terms and Conditions. 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.

## **Michael T. Stillman, PFS, Accredited Investment Fiduciary®**

Born 1957

### *Post-Secondary Education:*

University of Mississippi – 1980 BBA; 1985 Master of Accountancy

### *Recent Business Background:*

International Research & Asset Management, Inc., Senior Vice President 1999 – Present

International Research Securities, Inc., Registered Representative 1999 - Present

Patterson Stillman Farms LLC/ Owner 7/2006 – Present

PFS - Candidates for the PFS designation must first be CPAs. The CPA credential, in and of itself, implies a great deal of education, experience and technical skill. Furthermore, a CPA/PFS must:

- Be an AICPA member in good standing and agree to comply with continuing professional education and re-accreditation requirements.
- Have at least three years of personal financial planning experience, which must be documented with letters from clients and peers.
- Demonstrate special competence by passing a comprehensive financial planning examination.

Once a CPA earns the PFS designation, he or she must work to keep it by becoming reaccruited every three years. This process includes taking continuing professional education to stay abreast of the latest developments.

In addition, CPAs with the PFS designation must periodically evaluate and document the professional quality of their practices to ensure that they meet the highest standards of professionalism and integrity. The CPA/PFS must also continue to practice personal financial planning. If the nature of the CPA's practice changes and the number of financial planning hours drops below the minimum required, the CPA will lose the PFS designation.

AIF® - The Center for Fiduciary Studies offers classroom and web-based training programs for those aspiring to obtain the AIF designation. The classroom-based program is a two-day course with instructors from the Center for Fiduciary Studies staff. The web-based program is a series of PowerPoint modules with audio instruction. Those new to the field of fiduciary study may want to consider the benefits of the lively discussions that can occur in the classroom setting and the opportunity to ask questions.

## **Gordon L. Peterson, Ph.D**

Born 1942

### *Post-Secondary Education:*

BSc US Naval Academy, Annapolis, MD 1965

MA Boston University, Boston MA 1971

PhD London School of Economics, London, England 1975

### *Recent Business Background:*

International Research & Asset Management, Inc., Chairman & CEO 1987-present

International Research Securities, Inc., Chairman & CEO 1986-2018

## **Disciplinary Information**

---

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. No information is applicable to this Item.

## **Other Business Activities**

---

Gordon Peterson:

President of G Peterson & Co., Inc.

Member of two family real estate partnerships in Williamson County, Texas:  
Rabbit Hill Partners One LLC and Rabbit Hill Partners Two LLC

Neither outside business activity overlaps with Dr. Peterson's business activities as  
Chairman Emeritus at International Research.

## **Additional Compensation**

---

None Applies

## **Supervision**

---

The Chief Compliance Officer of the firm – Brett D. Anderson, 214-754-0770 – supervises the professional activities of the other individuals.

In the course of Mr. Anderson's ongoing supervision, his activities include, but are not limited to, the review of investment proposals, emails and other communications provided to clients by supervised individuals; periodic reviews of client portfolios to ensure they match client stated objectives; review of client meeting notes to ensure fiduciary standard is upheld; review of investments across client accounts to ensure investments and portfolios meet fiduciary standard of care.



## Requirements for State-Registered Advisers

---

Not Applicable