

**Cohen Investment Advisors, LLC**  
**Form ADV Part 2B**  
**Investment Adviser Brochure Supplement**

264 South River Road, Suite 422  
Bedford, NH 03110  
(603) 232-8350  
[www.investwithcohen.com](http://www.investwithcohen.com)

**Supervisor and Supervised Person:** Daniel Cohen

March 2020

This brochure supplement provides information about the Firm's Supervised Persons that supplements the Cohen Investment Advisors, LLC's brochure. You should have received a copy of that brochure. Please contact Daniel Cohen, Chief Executive Officer, Chief Investment Officer and Chief Compliance Officer if you did not receive Cohen Investment Advisors, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about the Firm's Supervised Persons is also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov). You may search this site using a unique identifying number, known as a CRD number for each Supervised Person.

## Educational Background and Business Experience

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Cohen Investment Advisors, LLC (Cohen or the Firm) generally requires that advisers in its employ have a bachelor's degree and further coursework demonstrating knowledge of financial planning and tax planning. Additionally, advisers must have work experience that demonstrates their aptitude for financial planning and investment management.

### **Supervised Person**

*Daniel Cohen*

Born 1969

CRD # 2414071

### **Employment History (5 years):**

Cohen Investment Advisors, LLC

2013 – Present

Chief Executive Officer, Chief Investment Officer and Chief Compliance Officer

UBS Financial Service

2008 – 2013

Senior Portfolio Manager

### **Formal Education after High School:**

Boston University

Bachelor in Business Administration, Finance

### **Professional Designations and Licenses:**

CFP®

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### **Professional Certifications**

Daniel Cohen maintains the following professional designation, which requires the following minimum requirements:

#### ***CFP® – Certified Financial Planner***

**Issued by:** Certified Financial Planner Board of Standards, Inc.

**Prerequisites/Experience Required:** Candidate must meet the following requirements:

- A bachelor's degree (or higher) from an accredited college or university, and
- 3 years of full-time personal financial planning experience

**Educational Requirements:** Candidate must complete a CFP-board registered program, or hold one of the following:

- CPA
- ChFC
- Chartered Life Underwriter (CLU)

- CFA
- Ph.D. in business or economics
- Doctor of Business Administration
- Attorney's License

**Examination Type:** CFP® Certification Examination

**Continuing Education/Experience Requirements:** 30 hours every 2 years

## **Disciplinary Information**

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Cohen Investment Advisors is required to disclose information regarding any legal or disciplinary events material to a client's evaluation of Daniel Cohen. Cohen Investment Advisors has no information to disclose in relation to this Item.

## **Other Business Activities**

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Disclosure on Outside Business Activities is provided in Form ADV Part 2A Item 10 – Other Financial Industry Activities and Affiliations.

Daniel Cohen is the Manager of Cohen Real Estate Advisors, LLC, which is the General Partner to the Cohen Real Estate Fund 2017, LLLP.

## **Additional Compensation**

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Daniel Cohen does not receive any economic benefit outside of regular salaries or bonuses except as described in Form ADV Part 2A Items 10 and 12.

## **Supervision**

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Daniel Cohen is the Chief Executive Officer, Chief Investment Officer and Chief Compliance Officer of Cohen Investment Advisors and is generally responsible for his own supervision.

Daniel Cohen seeks to ensure that investments are suitable for his individual clients and consistent with their individual needs, goals, objectives and risk tolerance, as well as any restrictions requested by Cohen Investment Advisors' clients. Daniel Cohen can be reached at (603) 232-8350.

## **Requirements for State Registered Advisers**

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Cohen Investment Advisors is required to disclose information regarding Daniel Cohen's involvement in certain civil, self-regulatory organization or administrative proceedings, arbitration awards or findings, or bankruptcy proceedings. Cohen Investment Advisors has no information to disclose in relation to this Item.