



Part 2B of Form ADV Brochure Supplement
Updated: January 26, 2021

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This Brochure Supplement provides information about Leonard R. Dean that supplements the Portsmouth-SmartLife Financial Group LLC Brochure. You should have received a copy of that Brochure. Please contact our office at (415-910-0477) if you did not receive the Portsmouth-SmartLife Financial Group LLC's Brochure or if you have any questions about the contents of this supplement. Additional information about Leonard R. Dean is available on the SEC's website at [IAPD - Investment Adviser Public Disclosure - Homepage \(sec.gov\)](https://www.sec.gov/IAPD-InvestmentAdviserPublicDisclosure-Homepage).

Educational Background and Business Experience – Item 2

Leonard R. Dean Year of Birth: 1949

Education:

- Cal State University, Long Beach, CA 09/1975 to 6/1977, BA
- Moorpark College, Moorpark, CA 09/1967 to 06/1969 AA

Business:

- Portsmouth-SmartLife Financial Group LLC, Investment Advisor Representative 02/2020 to Present
- Supreme Alliance LLC, Investment Advisor Representative, 10/2019 to 11/2019
- Allstate Financial Advisors, LLC, Investment Advisor Representative, 01/2011 to 09/2019
- Princor Financial Services Corporation, Investment Advisor Representative, 02/2001 to 12/2010

Disciplinary Information Item 3

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of Leonard R. Dean and Portsmouth-SmartLife

Financial Group LLC. Additional information is accessible through the [BrokerCheck - Find a broker, investment or financial advisor \(finra.org\)](#) Financial Industry Regulatory Authority {FINRA} and the Securities and Exchange Commission {SEC}. [IAPD - Investment Adviser Public Disclosure - Homepage \(sec.gov\)](#).

Other Business Activities - Item 4

DEAN BENNETT INSURANCE & FINANCIAL SERVICES, INC.

Position: President Nature: Insurance and financial services, Investment-related -No Number of hours: 5 during securities trading hours Start date: 09/01/2009

Description: Used as "DBA" for insurance and financial services sales. Administrative duties as Officer.

Spouse Deborah Bennett does group & individual medical, Medicare support & Long-Term Care. This entity is a DVBE (Disabled Veteran Business Entity).

Kaplan Professional -Securities/Insurance Exam Instructor-Part time 0 hours during trading hours. Start date 02/2020

FINRA arbitrator-Non-public 0 hours during trading hours.

Additional Compensation - Item 5

Please refer to the "Other Business Activities" section above for disclosures/additional compensation due to his other business activities.

Supervision - Item 6

Portsmouth-Smartlife Financial Group LLC has adopted and periodically updates a compliance manual that outlines for each employee the rules and regulations to which they must adhere. Portsmouth-Smartlife has appointed a Chief Compliance Officer who reviews and monitors employee activity concerning these rules and regulations. Also, Portsmouth-Smartlife has adopted a Code of Ethics that requires each employee to act in the best interest of clients at all times. Should you have questions related to these activities, please contact Randy Fox at 415-910-0477.

Requirements for State-Registered Advisers - Item 7

Mr. Dean has a reportable event; details of this event are located on FINRA's BrokerCheck system by clicking on the link [BrokerCheck - Find a broker, investment or financial advisor \(finra.org\)](#). This disclosure includes details of a customer complaint related to an insurance product. The case was settled for \$30,000 to cover legal fees.

I was notified by Placer County in Dec. 2011, that I had an unpaid 19' boat property tax due. It was paid the next day. I found out that the County did not send any notices and expected its citizens to just know it was due. I owned the boat for several years and had no other issues with the County. As a result, the County had filed a lien for \$200.70 annual tax bill. The lien was satisfied on 12/14/2011.