

This brochure supplement provides information about David L Englehart that supplements the Zimmermann Investment Management & Planning brochure. You should have received a copy of that brochure. Please contact David L Englehart if you did not receive Zimmermann Investment Management & Planning's brochure or if you have any questions about the contents of this supplement.

Additional information about David L Englehart is also available on the SEC's website at www.adviserinfo.sec.gov.

Zimmermann Investment Management & Planning

Form ADV Part 2B – Individual Disclosure Brochure

for

David L Englehart

Personal CRD Number: 1403903

Investment Adviser Representative

Zimmermann Investment Management & Planning

502 Bridge Street

New Cumberland, PA 17070

(717) 514-3059

dengl@zimllc.com

UPDATED: 05/24/2021

Item 2: Educational Background and Business Experience

Name: David L Englehart **Born:** 1954

Educational Background and Professional Designations:

Education:

Bachelors Psychology, Dartmouth - 1976

Business Background:

| | |
|-------------------|--|
| 01/2020 - Present | Registered Representative Purshe Kaplan Sterling Investments |
| 04/2019 - Present | Investment Adviser Representative Zimmermann Investment Management & Planning |
| 03/1998 - 01/2020 | Secretary Professional Asset Management Advisors Inc |
| 01/1989 - 12/2019 | IAR Professional Financial Advisors Inc |
| 07/2001 - Present | Vice President PFA Security Asset Management Inc |
| 09/1993 - Present | President Professional Tax Advisors Inc |

Item 3: Disciplinary Information

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

Item 4: Other Business Activities

David L Englehart is a registered representative. From time to time, he will offer clients advice or products from this activity. Clients should be aware that these services pay a commission and

involve a possible conflict of interest, as commissionable products can conflict with the fiduciary duties of a registered investment adviser. Zimmermann Investment Management & Planning always acts in the best interest of the client; including in the sale of commissionable products to advisory clients. Clients are in no way required to utilize the services any representative of Zimmermann Investment Management & Planning in such individual's outside capacity.

David L Englehart is a licensed insurance agent. From time to time, he will offer clients advice or products from this activity. Clients should be aware that these services pay a commission and involve a possible conflict of interest, as commissionable products can conflict with the fiduciary duties of a registered investment adviser. Zimmermann Investment Management & Planning always acts in the best interest of the client; including in the sale of commissionable products to advisory clients. Clients are in no way required to implement the plan through any representative of Zimmermann Investment Management & Planning in their capacity as a licensed insurance agent.

David L Englehart serves as a tax preparer at PTA Inc.

David L Englehart is a member at Lexington Woods Homeowners Association.

Item 5: Additional Compensation

David L Englehart does not receive any economic benefit from any person, company, or organization, other than Zimmermann Investment Management & Planning in exchange for providing clients advisory services through Zimmermann Investment Management & Planning.

Item 6: Supervision

As a representative of Zimmermann Investment Management & Planning, David L Englehart is supervised by Kimberly I. Swope, the firm's Chief Compliance Officer. Kimberly I. Swope is responsible for ensuring that David L Englehart adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Kimberly I. Swope is 717-403-6030.