

ADV Part 2B Brochure Supplement – Robert D’Agosta

Item 1 – Cover Page

Robert D’Agosta

IBN Financial Services, Inc.

404 Old Liverpool Rd.

Liverpool, NY 13088

Phone # 315-652-4426

This Brochure supplement provides information about Robert D’Agosta and supplements the IBN Financial Services, Inc. Brochure. You should have received a copy of that Brochure.

Additional information about IBN Financial Services, Inc. and Robert D’Agosta is available on the SEC’s website at <http://www.adviserinfo.sec.gov>

Robert D’Agosta is a registered representative of IBN Financial Services, Inc. He is also a ChFC (Chartered Financial Consultant), MBA (Masters in Business Administration) and an IAR (Investment Advisor Representative) in Pennsylvania, New Jersey, California, and Delaware.

Item 2 – Educational Background and Business Experience

Education

Lehigh University BA
Northwestern University MBA

Bethlehem, PA
Evanston, IL

Business History

August 2019 - Present	IBN Financial Services, Inc.
July 2004 - July 2019	Berthel Fisher and Company Financial Services, Inc.
2002 - 2004	MONEY Securities Corp IA
3/1990 - 2004	MONEY Mutual of New York
1990 - 1990	MONEY Mutual of New York
1989 - 1990	Martin Financial Services

Item 3 – Disciplinary History

Robert D’Agosta has (8) FINRA disclosure(s) for additional details you can ask for a copy from IBN or go to www.finra.org and go to Broker Check.

Item 4 – Other Business Activities

Robert D’Agosta sells life insurance and annuities through KAFL Insurance Brokerage, and the firm receives normal commissions if products are purchased through him. Robert D’Agosta also is a registered representative of IBN Financial Services, Inc., and may recommend securities or insurance products offered by the broker-dealer, and the firm receives normal commissions if products are purchased through him.

Item 5 – Additional Compensation

Robert D’Agosta does not receive any additional income outside of the income outlined above.

Item 6 – Supervision

Richard J Carlesco Jr. is the CEO, CFO and founding officer of IBN Financial Services, Inc. and Timothy E. Evans CCO perform supervisory duties for the firm and reviews any business done by Robert D’Agosta

Item 7 – Requirements for State-Registered Advisers

Robert D’Agosta has no reportable events to disclose here other than disclosed above.

Item 8 - Lines of Business

Individuals, Pension/Profit Sharing Plans, High Net Worth Individuals, Pension Consulting, Financial Planning Services.