

# **Eric R. Ebbert, CFP®**

## **Brochure Supplement**

**(Part 2B of Form ADV)**

**Dated 6/12/2019**

## **ProVise Management Group, LLC**

**SEC File Number: 801 – 32172**

**611 Druid Road, Suite 105**

**Clearwater, Florida 33756**

**[www.provise.com](http://www.provise.com)**

**This brochure supplement provides information about Eric R. Ebbert that supplements the ProVise Management Group, LLC (“ProVise”) brochure. You should have received a copy of that brochure. Please contact V. Raymond Ferrara, Chief Compliance Officer at (727) 441-9022 or [info@provise.com](mailto:info@provise.com) if you did not receive ProVise’s brochure or if you have any questions about the contents of this supplement.**

**Additional information about Eric R. Ebbert is available on the SEC’s website at [www.sec.gov/investor/brokers.htm](http://www.sec.gov/investor/brokers.htm).**

**The information in this brochure supplement has not been approved or verified by the United States Securities and Exchange Commission or by any state securities authority.**

## **Educational Background and Business Experience**

Eric Ebbert was born in 1961. He graduated from Hamilton College with a BA in Economics in 1983. In 1987, Eric attained his MBA from the Fuqua School of Business at Duke University. In the years to follow, he obtained his securities and insurance licenses, as well as his CERTIFIED FINANCIAL PLANNER™ (CFP®) designation. This designation is explained in further detail below:

- CERTIFIED FINANCIAL PLANNER™ (CFP®) –Issued by the Certified Financial Planner Board of Standards (202-379-2200, [www.cfp.net](http://www.cfp.net)). The CFP® designation is conveyed to financial professionals who have met rigorous professional standards and have agreed to the principles of integrity, objectivity, competence, fairness, confidentiality, professionalism and diligence when dealing with clients. Successful candidates must typically hold a Bachelor’s degree, complete required course of study, hold relevant work experience, pass a background check, pass an extensive examination and comply with a code of ethics. Continuing Education Requirements - 30 hours every two years.

Prior to entering the financial advisory field, Eric worked for IBM in San Francisco and Tampa, and was a Sports Editor for a Connecticut newspaper.

In 2000, Eric joined ProVise Management Group, LLC (“ProVise”) after five years of managing the financial assets of a Tampa entrepreneur and his family. Eric is the President, Chief Operating Officer, Investment Advisory Representative and Insurance Agent of ProVise.

At the time ProVise was acquired by National Financial Partners (“NFP”) in 2002, Eric and his Partners established ProVise Management Company, Inc. (“PMC”) which has an exclusive, perpetual contract to manage ProVise. He is also President of PMC.

Prior to joining NFP Advisor Services, LLC (“NFPAS”), a Broker-Dealer and member of FINRA/SIPC, as a Registered Representative and Investment Advisor Representative, in 2002, Eric was registered with InterSecurities, Inc. On December 7, 2015, he voluntarily terminated his registrations with NFPAS.

## **Disciplinary Information**

NONE

## **Outside Business Activities**

*ProVise Management Company, Inc. – Partner*

As mentioned above, Eric is a shareholder in PMC, which has a contract to manage ProVise on behalf of Kestra Financial. Kestra Financial pays PMC an annual fee based on the profits of ProVise. This fee is deposited into PMC and Eric's salary and shareholder distributions are paid from PMC. His time spent on this activity is less than 5%.

## **Additional Compensation**

NONE

## **Supervision**

ProVise has established a system of compliance and supervision we believe is reasonably designed to oversee the activities of Eric Ebbert in accordance with applicable law. Ray Ferrara, Chairman/CEO and CCO, is his designated supervisor. Ray (and/or his designee) monitors Eric's activities throughout our client relationship management system and with frequent office interactions.

Ray Ferrara may be contacted via email at [ferrara@provis.com](mailto:ferrara@provis.com) or via phone at 727-441-9022, ext. 232. Ray's designee, Marianne Commorato, may be contacted via email at [commorato@provis.com](mailto:commorato@provis.com) or via phone at 727-441-9022, ext. 234.