

Allan W. Moskowitz

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This brochure supplement provides information about **Allan W. Moskowitz, CFP** that supplements the Protected Investors of America Form ADV Part 2A. You should have received a copy of that brochure. Please contact **Heidi Johnson, Chief Compliance Officer, 415 398-4363 Heidi@protectedinvestors.com**, if you did not receive Protected Investors of America's ADV II brochure or if you have any questions about the contents of this supplement.

Additional information about **Allan W. Moskowitz** is available on the SEC's website at www.adviserinfo.sec.gov.

Educational Background and Business Experience:

- Allan W. Moskowitz
- Born June 30, 1950
- BS in Human Science and Doctor of Chiropractic (DC) Degrees Earned from Logan College 1977
- Attended University of New Mexico, 1968-1971
- CERTIFIED FINANCIAL PLANNER, licensee since 1993, requiring 15 hours of Continuing Education per year, and passing licensure examination in 1992, plus six years investment related experience
- Accredited Investment Fiduciary since 2005, requiring 6 hours of continuing education per year.

Disciplinary Information:

Allan is not subject to any disciplinary disclosures.

Other Business Activities:

Allan is not actively involved in any other investment related activity beyond his registration with Protected Investors of America, as a fee-only Investment Advisory Representative (IAR).

Non-Investment Related Outside Business Activities:

Allan is involved in income/rental related real estate and maintains an active New Mexico Chiropractic License with 16 hours of Chiropractic continuing education per year. He is also the coordinator and sometimes guitar teacher for Guitars Not Guns (volunteer), and a member of the Pro-Bono Public Outreach committee of the East Bay Financial Planning Association.

Additional Compensation:

Outside of Protected Investors, Allan receives rental income related to real estate investments.

Supervision:

PIA's Chief Compliance Officer (CCO), Heidi Johnson (telephone: (415) 869-5968, email: Heidi@protectedinvestors.com), supervises all PIA Investment Advisory Representatives (IARs) and their business.

This supervision is accomplished in a number of ways, including but not limited to the following:

- Daily approval of new investment advisory and financial planning and consulting contracts executed between PIA Advisors and their clients.
- Regular and routine review of all PIA Advisor email and hard copy correspondence with clients.
- Routine review of Financial Plans, Investment Policy Statements, Projections and other reports prepared by PIA Advisors for their clients.
- Routine review of PIA Advisor quarterly portfolio reports disseminated to clients.
- Routine onsite audits of PIA Advisor offices, including review of client documents, files, and trade history.