

**Daniel P. Siffermann  
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**FORM ADV PART 2B  
BROCHURE SUPPLEMENT**

**This brochure supplement provides information about Daniel P. Siffermann that supplements the Interactive Financial Adviser's brochure. You should have received a copy of that brochure. Please call 630-472-1300 if you did not receive Interactive Financial Adviser's brochure or if you have any questions about the contents of this supplement.**

**Additional information about Daniel P. Siffermann is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

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## ***Educational Background and Business Experience***

**Daniel P. Siffermann, CASL® CLU® ChFC®**

**Year of Birth:** 1965

**Formal Education After High School:**

- BS, Arizona State University 1987.

**Business Background:**

- San Marcos Insurance, Owner/Agent 01/2010 –Present
- Interactive Financial Advisors, Investment Advisor Representative, 4/2010 to Present

**Certifications:**

**Chartered Financial Consultant [ChFC®]:** This designation is issued by The American College and is granted to individuals who have at least three years of full-time business experience within the five years preceding the awarding of the designation. The candidate is required to take seven mandatory courses which include the following disciplines: financial, insurance, retirement and estate planning; income taxation, investments and application of financial planning; as well as two elective courses involving the application of the aforementioned disciplines. Each course has a final proctored exam and once issued, the individual is required to submit 30 hours of continuing education every two years.

**Chartered Life Underwriter [CLU®]:** This designation is issued by The American College and is granted to individuals who have at least three years of full-time business experience within the five years preceding the awarding of the designation. The candidate is required to take a series of mandatory courses which include, for example, the following: insurance planning, life insurance law, fundamentals of estate planning, planning for business owners, income taxation, group benefits, planning for retirement needs, and investments. Each course has a final proctored exam and once issued, the individual is required to submit 30 hours of continuing education every two years.

**Chartered Advisor for Senior Living® (CASL®):** The CASL® credential provides advisors with in-depth training on issues impacting seniors and those planning for retirement. The designation incorporates five required, college-level courses that represent an average total study time of more than 250 hours. Topics include investments, estate planning, health and long-term care financing, and financial decisions for retirement. CASL® designees must meet experience, continuing education and ethics requirements. The credential is awarded by The American College, a non-profit educator with an 84-year heritage and the top level of academic accreditation

## ***Disciplinary Information***

Daniel P. Siffermann has no reportable disciplinary information.

### ***Other Business Activities***

Mr. Siffermann has an ownership interest in San Marcos Insurance, a licensed insurance agency. Mr. Siffermann is also separately licensed as an independent insurance agent. In this capacity, he can effect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by San Marcos Insurance and/or Mr. Siffermann for insurance related activities. This presents a conflict of interest because Mr. Siffermann may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.

### ***Additional Compensation***

Mr. Siffermann does not receive any additional compensation beyond the fee-based compensation he receives through Interactive Financial Advisors and as described above (see "Other Business Activities") in this Brochure Supplement

### ***Supervision***

Daniel P. Siffermann is supervised by Richard L. Peterbok, President of the firm. Michael Scherrman, Chief Compliance Officer monitors e-mail communications and reviews personal accounts on a periodic basis. Mr. Peterbok and Mr. Scherrman can be reached at 630-472-1300.

**BrokerCheck is a free tool to help clients and prospective clients make informed decisions regarding their financial situation. Please use the following link if you wish to conduct your own due diligence: <http://brokercheck.finra.org/>.**