

FORM ADV: PART 2B

BROCHURE SUPPLEMENT



FINANCIAL ADVISORS

Butensky & Cohen Financial Security, Inc.

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info@bandcfinancial.com

SUPERVISION

Jacqueline A. Bos
Chief Compliance Officer

Phone: 904.273.9850
E-mail: jacque@bandcfinancial.com

Ms. Bos oversees the advisory activities of all supervised persons and manages our compliance related issues.

Duties include reviewing investment activities to ensure all supervised persons are acting in your best interests in discharging their duties. Any transactions that appear to be out of the ordinary are checked.

BROCHURE SUPPLEMENT DATED

1
JANUARY
2025

This Brochure Supplement provides information about Allan A. Cohen that is an accompaniment to the Disclosure Brochure for our firm, Butensky & Cohen Financial Security, Inc. You should have received both of these together as a complete disclosure packet. If you did not receive our Disclosure Brochure or if you should have questions about this Brochure Supplement for Mr. Cohen, you are welcome to contact us – our contact information is listed to the left.

Additional information about Butensky & Cohen Financial Security, Inc and Allan A. Cohen are also available on the SEC's website at www.adviserinfo.sec.gov.

Allan A. Cohen, CFP®

CRD#: 720627

Year of Birth: 1948

EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Education

1970 – Jacksonville University: Bachelor of Science in Accounting

Licenses

Certified Public Accountant – Florida (Retired)

FINRA Exams: Series 7 – General Securities Representative (Retired)

Series 9/10 – (Old Series 8) General Securities Sales Supervisor (Retired)

Series 24 – General Securities Principal (Retired)

Series 63 – Uniform Securities Agent State Law Examination (Retired)

Series 65 – Uniform Investment Advisor Law Examination

Insurance: 2-15 License – Florida Life, Health & Annuity Insurance (Retired)

Designations: CERTIFIED FINANCIAL PLANNER™ (CFP®) Certification – The CFP® designation requires one to meet rigid standards, education, examination, experience, and ethics requirements, pay an ongoing certification fee, and annual continuing education.

Business Background

03/1995 – Present.....Butensky & Cohen Financial Security, Inc.

Position: Chief Executive Officer/Principal

03/1995 – 12/2020 ..Butensky & Cohen, Inc.

Position: Managing Director /Principal

06/1997 – 12/2006 ..The Concord Equity Group, Inc.

Position: Registered Representative

03/1995 – 06/1997 ..Coleman & Company Securities, Inc.

Position: Registered Representative

05/1984 – 02/1995 ..Prudential Securities, Inc.

Position: Vice President – Investments

1978 – 1983..Harper & Cohen, CPAs

Position: CPA/Owner

1973-1978...James & Harris, CPAs

Position: Staff CPA

DISCIPLINARY INFORMATION

There are no legal or disciplinary events to report.

OTHER BUSINESS ACTIVITIES

Individual Trustee Services

Allan A. Cohen, in his individual capacity, provides individual trustee services. In some cases, he serves as trustee for clients of B&C Financial Advisors. Fees charged by Mr. Cohen for trustee services are detailed and agreed upon with each client before Mr. Cohen assumes trustee responsibilities. Fees charged for trustee services are separate from the fees charged for investment advisory services provided by B&C Financial Advisors. Please refer to Item 5 of Form ADV Part 2A for details of our investment advisory fee arrangements. Mr. Cohen will share in fees received by B&C Financial Advisors in addition to fees received by him for services as trustee. Trustee clients are aware Mr. Cohen receives a trustee fees and B&C Financial Advisors investment advisory fees and receive a copy of Mr. Cohen's trustee invoice and a quarterly investment advisory fee statement.

Mr. Cohen's duties as trustee include administering the trust in accordance with the terms and conditions of the trust instrument and applicable laws under the state in which the trust operates. Mr. Cohen fully respects the traditional duties of trusteeship such as the obligation of loyalty, good faith, prudence, and impartiality in the administration of the trust corpus. He strives to treat beneficiaries fairly and shall keep and render clear and accurate accounting records. Disclosure of the trust, trust terms and trust corpus to third parties is limited to that which, in Mr. Cohen's reasonable discretion, is proportionate and appropriate. He shall consider the reasonable request of any trust beneficiary but shall be under no obligation to act on such request and shall continue, at all times, to exercise independent discretionary management of the trust estate.

Mr. Cohen is involved in other business activities. 110 Professional LLC, also located at 110 Professional Drive, Suite 101, Ponte Vedra Beach, FL 32081 was established for the purpose of Real Estate Investment Managers Relationship started 10/28/2020. Approximate hours a month devoted to the LLC is 2-3 hours. Hours devoted to LLC during securities trading hours is 0 - 1 hour. Duties include building management, account payables, accounting/tax preparations.

ADDITIONAL COMPENSATION

Mr. Cohen does not receive any economic benefit, sales awards, prizes or bonuses that are based on the number or amount of sales, client referrals, or from opening new accounts.