

Allan W. Moskowitz, CFP®, AIF®

2606 Vale Road
San Pablo, CA 94806
510-215-6700

Protected Investors of America

235 Montgomery St. Suite 1050
San Francisco, CA 94104
(415) 398-4363

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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 **Carol Hallberg, Chief Compliance Officer, 415 398-4363** carol@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
- Securities and Insurance licensed since 1990
- 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
- FINRA series 7 General Securities, and Series 63, State licenses since 1990
- FINRA Series 24 Supervisory license since 1996

Disciplinary Information:

Allan is not subject to any disciplinary disclosures.

Other Business Activities:

Allan is also a Registered Representative (RR) with Protected Investors of America. As a RR, Allan is licensed to sell financial products, including, equity securities, municipal and corporate bonds, options, variable annuities, private placements, and other securities.

Non-Investment Related Outside Business Activities:

I am involved in income/rental related real estate and maintain an active New Mexico Chiropractic License with 16 hours of Chiropractic continuing education per year.

Additional Compensation:

Outside of Protected Investors, I have rental income related to real estate investments and occasional compensation from Life, Health Disability and Long Term Care Insurance.

Supervision:

PIA's Chief Compliance Officer (CCO), Carol Hallberg (telephone: (415) 869-5968, email: carol@protectedinvestors.com), supervises all PIA Investment Advisory Representatives (IAR's) 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.