

**Mark A. Bertrang**

**Interactive Financial Advisors**

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**Form ADV Part 2B Brochure Supplement**

This Brochure Supplement provides information about Mark A. Bertrang that supplements the Interactive Financial Advisors Brochure. You should have received a copy of that Brochure. Please contact 630-472-1300 if you did not receive Interactive Financial Advisors' Brochure or if you have any questions about the contents of this supplement.

Additional information about Mark A. Bertrang is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

### **Educational Background and Business Experience - Item 2**

Mark A. Bertrang  
Year of Birth: 1960

**Education:**

- Brown Institute, Minneapolis, MN, Radio and TV Broadcasting, Associates Degree, 09/1979

**Business:**

- Interactive Financial Advisors, Investment Adviser Representative, 01/2016– Present
- Fortune Financial Services, Registered Representative, 09/2020 – Present
- Brooklight Place Securities, Registered Representative, 03/2013 – 09/2020
- Bertrang Financial Corp., President, 08/1995 – 12/2024
- Financialoscopy Inc., President, 01/2025 – Present

**Professional Designations Qualifications:**

Chartered Life Underwriter® (CLU®), 1993

The CLU® designation is issued by The American College of Financial Services in Bryn Mawr, Pennsylvania. This designation is granted to individuals who hold the ChFC® and/or CFP® certification and want to enhance their careers by completing at least five courses to earn the CLU® designation in addition to having 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 courses which gives advisors an in-depth knowledge of life insurance underwriting concepts and life insurance law within the context of overall risk management, the necessary knowledge to help clients address their estate planning needs, and an understanding of solutions addressing the life insurance underwriting needs of business owners and professionals.

Chartered Financial Consultant® (ChFC®), 1995

The Chartered Financial Consultant® designation is a financial credential awarded by the American College to individuals who satisfy educational, work experience and ethics requirements. Recipients of the ChFC® certification have completed, and passed examinations, on at least seven mandatory college-level courses in the areas of financial, insurance, retirement and/or estate planning, as well as income taxation and/or investments. Additionally, recipients have completed at least three elective courses on the financial system, estate planning applications, executive compensation, and/or retirement decisions. In order to maintain this designation, ChFC® holders must satisfy the ongoing requirements of the Professional Achievement in Continuing Education ("PACE"), which includes at least 30 hours of continuing education every two years.

### Disciplinary Information - Item 3

Mark A. Bertrang has no legal or disciplinary events to report. Mark A Bertrang also does not have any administrative enforcement proceedings, self-regulatory organization enforcement proceedings or any other proceedings to report.

### Other Business Activities - Item 4

#### **Registered Representative of Fortune Financial Services**

Mark Bertrang is a registered representative with Fortune Financial Services, Inc. Fortune Financial Services, Inc. is a diversified financial services company engaged in the sale of specialized investment products. In this capacity, Mark Bertrang may recommend securities or insurance products offered by Fortune Financial Services, Inc. as part of your investment portfolio. If clients purchase these products through Mark Bertrang, he will receive the customary commissions in his separate capacity as registered representatives of Fortune Financial Services, Inc.

Additionally, Mark Bertrang could be eligible to receive incentive awards such as Fortune Financial Services, Inc. may offer. He may also receive 12b-1 fees from mutual funds that pay such fees. The receipt of additional compensation may give Mark Bertrang an incentive to recommend investment products based on the compensation received, rather than on your investment needs. Please refer to the Fees and Compensation section and the Client Referrals and Other Compensation section of Interactive Financial Advisors' firm brochure for additional disclosures on this topic.

**Insurance Broker** Mark Bertrang is independently licensed to sell insurance and annuity products through various insurance companies. When acting in this capacity, Mark Bertrang will receive commissions for selling insurance and annuity products. Mark Bertrang may also receive other incentive awards for the recommendation/sale of annuities and other insurance products. The receipt of compensation and other incentive benefits may affect the judgment of Mark Bertrang when recommending products to its clients. While Mark Bertrang endeavors at all times to put the interest of his clients first as a part of Interactive Financial Advisor's overall fiduciary duty to clients, clients should be aware that the receipt of commissions and additional compensation itself creates a conflict of interest, and may affect Mark A. Bertrang's decision making process when making recommendations.

**Additional Compensation – Item 5**

Please refer to the *Other Business Activities* section above for disclosures on Mr. Bertrang's receipt of additional compensation as a result of his activities as a registered representative of Fortune Financial Services, a licensed insurance agent and his activities through Financialoscopy®.

Mark Bertrang is the author of "Investments Don't Hug" for which he receives royalties from the sale of the book.

Also, please refer to the *Fees and Compensation* section and the *Client Referrals and Other Compensation* section of Interactive Financial Advisors firm brochure for additional disclosures on this topic.

**Supervision - Item 6**

Mark A. Bertrang is supervised by Richard L. Peterbok, President and Chief Compliance Officer of Interactive Financial Advisors. Mr. Peterbok monitors e-mail communications and reviews personal accounts on a periodic basis. Mr. Peterbok can be reached at 630-472-1300.