IAPD Report

ERIC DONNER

CRD# 1633713

Section Title | **Page(s)**

IAPD Information About Representatives

IAPD offers information on all current-and many former representatives. Investors are strongly encouraged to use IAPD to check the background of representatives before deciding to conduct, or continue to conduct, business with them.

What is included in a IAPD report?

IAPD reports for individual representatives include information such as employment history, professional qualifications, disciplinary actions, criminal convictions, civil judgments and arbitration awards.

It is important to note that the information contained in an IAPD report may include pending actions or allegations that may be contested, unresolved or unproven. In the end, these actions or allegations may be resolved in favor of the representative, or concluded through a negotiated settlement with no admission or finding of wrongdoing.

Where did this information come from?

The information contained in IAPD comes from the Investment Adviser Registration Depository (IARD) and FINRA's Central Registration Depository, or CRD, (see more on CRD below) and is a combination of:

- information the states require representatives and firms to submit as part of the registration and licensing process, and
- information that state regulators report regarding disciplinary actions or allegations against representatives.

How current is this information?

Generally, representatives are required to update their professional and disciplinary information in IARD within 30 days.

Need help interpreting this report?

For help understanding how to read this report, please consult NASAA's IAPD Tips page
http://www.nasaa.org/IAPD/IARReports.cfm

What if I want to check the background of an Individual Broker or Brokerage Firm?

To check the background of an Individual Broker or Brokerage firm, you can search for the firm or individual in IAPD. If your search is successful, click on the link provided to view the available licensing and registration information in FINRA's BrokerCheck website.

Are there other resources I can use to check the background of investment professionals?

It is recommended that you learn as much as possible about an individual representative or Investment Adviser firm before deciding to work with them. Your state securities regulator can help you research individuals and certain firms doing business in your state. The contact information for state securities regulators can be found on the website of the North American Securities Administrators Association http://www.nasaa.org

Report Summary

ERIC DONNER (CRD# 1633713)

The report summary provides an overview of the representative's professional background and conduct. The information contained in this report has been provided by the representative, investment adviser and/or securities firms, and/or securities regulators as part of the states' investment adviser registration and licensing process. The information contained in this report was last updated by the representative, a previous employing firm, or a securities regulator on **11/13/2025**.

CURRENT EMPLOYERS

	Firm	CRD#	Registered Since
IA	INDEPENDENT FINANCIAL PARTNERS	CRD# 125112	01/02/2019
B	IFP SECURITIES, LLC	CRD# 297287	05/22/2019

QUALIFICATIONS

This representative is currently registered in **1** SRO(s) and **4** jurisdiction(s).

Is this representative currently Inactive or Suspended with any regulator? **No**

Note: Not all jurisdictions require IAR registration or may have an exemption from registration.
Additional information including this individual's qualification examinations and professional designations is available in the Detailed Report.

REGISTRATION HISTORY

This representative was previously registered with the following firm(s):

	FIRM	CRD#	LOCATION	REGISTRATION DATES
IA	TEAM HEWINS, LLC	291194	BOCA RATON, FL	06/15/2018 - 01/02/2019
IA	HEWINS FINANCIAL ADVISORS, LLC	109983	Boca Raton, FL	09/14/2016 - 06/01/2018
B	VALMARK SECURITIES, INC.	31243	Boca Raton, FL	03/14/2011 - 05/31/2018

For additional registration and employment history details as reported by the individual, refer to the Registration and Employment History section of the Detailed Report.

DISCLOSURE INFORMATION

Disclosure events include certain criminal charges and convictions, formal investigations and disciplinary actions initiated by regulators, customer disputes and arbitrations, and financial disclosures such as bankruptcies and unpaid judgments or liens.

Are there events disclosed about this representative? **Yes**

The following types of events are disclosed about this representative:

Type	Count
Criminal	1

Qualifications

REGISTRATIONS

This section provides the SRO, states and U.S. territories in which the representative is currently registered and licensed, the category of each registration, and the date on which the registration becomes effective. This section also provides, for each firm with which the representative is currently employed, the address of each location where the representative works.
This individual is currently registered with **4** jurisdiction(s) and 1 SRO(s) through his or her employer(s).

Employment 1 of 2

Firm Name: **IFP SECURITIES, LLC**

Main Address: 3030 NORTH ROCKY POINT DRIVE WEST,
SUITE 700
TAMPA, FL 33607

Firm ID#: 297287

	Regulator	Registration	Status	Date
B	FINRA	Direct Participation Programs	Approved	05/22/2019
B	FINRA	Invest. Co and Variable Contracts	Approved	05/22/2019
B	Florida	Agent	Approved	05/28/2019
B	New Jersey	Agent	Approved	06/18/2019
B	New York	Agent	Approved	06/17/2019
B	Puerto Rico	Agent	Approved	11/25/2024

Branch Office Locations

8181 W. Broward Boulevard
Ste 370
Plantation, FL 33324

Employment 2 of 2

Firm Name: **INDEPENDENT FINANCIAL PARTNERS**

Main Address: 3030 NORTH ROCKY POINT DRIVE WEST
SUITE 700
TAMPA, FL 33607

Firm ID#: 125112

Qualifications

	Regulator	Registration	Status	Date
IA	Florida	Investment Adviser Representative	Approved	01/29/2019

Branch Office Locations

INDEPENDENT FINANCIAL PARTNERS
8181 W. Broward Boulevard
Suite 370
Plantation, FL 33324

Qualifications

PASSED INDUSTRY EXAMS

This section includes all industry exams that the representative has passed. Under limited circumstances, a representative may attain registration after receiving an exam waiver based on a combination of exams the representative has passed and qualifying work experience. Likewise a new exam requirement may be grandfathered based on a representative's specific qualifying work experience. Exam waivers and grandfathering are not included below.

This individual has passed 0 principal/supervisory exams, 3 general industry/product exams, and 1 state securities law exam.

Principal/Supervisory Exams

Exam	Category	Date
No information reported.		

General Industry/Product Exams

	Exam	Category	Date
B	Securities Industry Essentials Examination (SIE)	SIE	05/31/2018
B	Direct Participation Programs Representative Examination (S22)	Series 22	08/23/1989
B	Investment Company Products/Variable Contracts Representative Examination (S6)	Series 6	04/16/1987

State Securities Law Exams

	Exam	Category	Date
B	Uniform Securities Agent State Law Examination (S63)	Series 63	05/12/1987

PROFESSIONAL DESIGNATIONS

This section details that the representative has reported **1** professional designation(s).

Chartered Financial Consultant

Only professional designations listed in Question 8 of the Form U4 will appear in this section if the appropriate box is checked and verified by the issuing organization at the time of the filing. Learn more about eligible designations at IARD and NASAA.

Registration & Employment History

PREVIOUSLY REGISTERED WITH THE FOLLOWING FIRMS

This representative held registrations with the following firms:

	Registration Dates	Firm Name	ID#	Branch Location
IA	06/15/2018 - 01/02/2019	TEAM HEWINS, LLC	CRD# 291194	BOCA RATON, FL
IA	09/14/2016 - 06/01/2018	HEWINS FINANCIAL ADVISORS, LLC	CRD# 109983	Boca Raton, FL
B	03/14/2011 - 05/31/2018	VALMARK SECURITIES, INC.	CRD# 31243	Boca Raton, FL
IA	05/04/2011 - 12/31/2016	VALMARK ADVISERS, INC.	CRD# 108050	BOCA RATON, FL
IA	08/02/2011 - 03/12/2012	RWA ADVISORS	CRD# 150120	BOCA RATON, FL
IA	07/02/2002 - 10/16/2009	NFP SECURITIES, INC.	CRD# 42046	NEW PROVIDENCE, NJ
B	08/23/1997 - 10/16/2009	NFP SECURITIES, INC.	CRD# 42046	NEW PROVIDENCE, NJ
B	12/08/1994 - 09/04/1997	EQ FINANCIAL CONSULTANTS, INC.	CRD# 6627	NEW YORK, NY
B	12/08/1994 - 09/04/1997	THE EQUITABLE LIFE ASSURANCE SOCIETY OF THE UNITED STATES	CRD# 4039	NEW YORK, NY
B	04/20/1987 - 11/10/1994	ALLMERICA INVESTMENTS, INC.	CRD# 3960	WORCESTER, MA

EMPLOYMENT HISTORY

Below is the representative's employment history for up to the last 10 years.

Employment Dates	Employer Name	Position	Investment Related	Employer Location
05/2019 - Present	IFP Securities, LLC	Registered Representative	Y	Highland Beach, FL, United States
01/2019 - Present	Independent Financial Partners	Registered Investment Advisor	Y	Tampa, FL, United States
05/2018 - 01/2019	TEAM HEWINS, LLC	SENIOR FINANCIAL ADVISOR	Y	BOCA RATON, FL, United States
04/2009 - 01/2019	EXCLUSIVE INSURANCE PGA	OWNER	N	WARREN, NJ, United States

Registration & Employment History

EMPLOYMENT HISTORY

Employment Dates	Employer Name	Position	Investment Related	Employer Location
09/2016 - 06/2018	HEWINS FINANCIAL ADVISORS, LLC	SENIOR FINANCIAL ADVISOR	Y	BOCA RATON, FL, United States
03/2011 - 05/2018	VALMARK SECURITIES, INC.	REGISTERED REPRESENTATIVE	Y	AKRON, OH, United States
05/2011 - 12/2016	VALMARK ADVISERS, INC.	INVESTMENT ADVISOR REPRESENTATIVE	Y	AKRON, OH, United States

OTHER BUSINESS ACTIVITIES

This section includes information, if any, as provided by the representative regarding other business activities the representative is currently engaged in either as a proprietor, partner, officer, director, employee, trustee, agent, or otherwise. This section does not include non-investment related activity that is exclusively charitable, civic, religious, or fraternal and is recognized as tax exempt.

(1)Clear Advice Financial - DBA - Investment related. 1200 N Federal Hwy, Ste 200, Boca Raton, FL 33432; Managing Member/Financial Advisor/Owner. Financial planning, investment planning, insurance planning and fixed insurance (life and disability sales). Start January 2019. 10-20 hours per week.

(2) Stolen Moments, LLC; Investment Related; 3700 S Ocean Blvd, 805, Highland Beach, FL 33487; This is an LLC that my wife is the sole owner and managing member that invested in two LLCs that invested in a private estate deals; start 1/17/19.

(3) Madison Trust Company FBO Eric Donner; Investment Related; The LLC's principal business is at 1900 NW Corporate Blvd., Ste 215W, Boca Raton, FL 33431; Investing a self directed IRA through Madison Trust as the intermediary in Fayetteville Housing, LLC a Florida LLC which will invest in one private real estate deal; start August 2019.

(4) Fayetteville Housing, LLC; this is an LLC for a private real estate deal with my self-directed IRA through Madison Trust; investment related; 1900 NW Corporate Blvd - 215W; Boca Raton, FL 33431; through Madison Trust I invested in Fayetteville Housing, LLC which invested in The Marshall housing project at University of Arkansas; start 6/26/19.

(5) Six Months and a Day, LLC; not investment related; 1200 North Federal Hwy, Ste 200, Boca Raton, FL 33487; Start-up that provide change of residency services to individuals; Management Duties; start May 4, 2020; 10 hrs/month, 10 hrs/month during trading.

(6)Israel Heart 2 Heart - Not investment related - 1302 East Las Olad Blvd Ft. Lauderdale, FL 33301 - Mission is to make an impact on the lives of wounded Israeli soldiers with PTSD - Volunteer - Aug. 10, 2020 - 8hrs/month; 0hrs during trading hrs

(7) Clear Advice Business, LLC; Business Exit Consulting; Not Investment related; 3700 South Ocean Blvd, Ste 805, Highland Beach, FL 33487; Owner; Work as a business consultant to assist business owners in preparing for their future exit; Start 2/1/19; 5 hr//mo, 5 hr/mo during trading.

Disclosure Summary

Disclosure Information

What you should know about reported disclosure events:

(1) Certain thresholds must be met before an event is reported to IARD, for example:

- A law enforcement agency must file formal charges before an Investment Adviser Representative is required to report a particular criminal event.;
- A customer dispute must involve allegations that an Investment Adviser Representative engaged in activity that violates certain rules or conduct governing the industry and that the activity resulted in damages of at least $5,000.

(2) Disclosure events in IAPD reports come from different sources:

As mentioned in the "About IAPD" section on page 1 of this report, information contained in IAPD comes from Investment Adviser Representatives, firms and regulators. When more than one of these sources reports information for the same disclosure event, all versions of the event will appear in the IAPD report. The different versions will be separated by a solid line with the reporting source labeled.

(3) There are different statuses and dispositions for disclosure events:

- A disclosure event may have a status of *pending, on appeal,* or *final*.
    - A "pending" disclosure event involves allegations that have not been proven or formally adjudicated.
    - A disclosure event that is "on appeal" involves allegations that have been adjudicated but are currently being appealed.
    - A "final" disclosure event has been concluded and its resolution is not subject to change.
- A final disclosure event generally has a disposition of *adjudicated, settled* or *otherwise resolved*.
    - An "adjudicated" matter includes a disposition by (1) a court of law in a criminal or civil matter, or (2) an administrative panel in an action brought by a regulator that is contested by the party charged with some alleged wrongdoing.
    - A "settled" matter generally represents a disposition wherein the parties involved in a dispute reach an agreement to resolve the matter. Please note that Investment Adviser Representatives and firms may choose to settle customer disputes or regulatory matters for business or other reasons.
    - A "resolved" matter usually includes a disposition wherein no payment is made to the customer or there is no finding of wrongdoing on the part of the Investment Adviser Representative. Such matters generally involve customer disputes.

(4) You may wish to contact the Investment Adviser Representatives to obtain further information regarding any of the disclosure events contained in this IAPD report.

DISCLOSURE EVENT DETAILS

When evaluating this information, please keep in mind that some items may involve pending actions or allegations that may be contested and have not been resolved or proven. The event may, in the end, be withdrawn, dismissed, resolved in favor of the Investment Adviser Representative, or concluded through a negotiated settlement with no admission or finding of wrongdoing.

This report provides the information exactly as it was reported to the Investment Adviser Registration Depository. Some of the specific data fields contained in the report may be blank if the information was not provided.

The following types of events are disclosed about this representative:

Type	Count
Criminal	1

Criminal

This disclosure event involves a criminal charge against the Investment Adviser Representative that has resulted in a dismissal, plea, acquittal or conviction. The criminal matter may relate to any felony or certain misdemeanor offenses (e.g., bribery, perjury, forgery, counterfeiting, extortion, fraud, wrongful taking of property).

Disclosure 1 of 1

Reporting Source:	Individual
Court Details:	WEST HARTFORD POLICE DEPARTMENT N/A
Charge Date:	03/15/1983
Charge Details:	1 COUNT- MISDEMEANOR- CHARGES DISMISSED - STEALING A SALAMI
Felony?	No
Current Status:	Final
Status Date:	07/18/1983
Disposition Details:	DISMISSED ON 7/18/1983
Broker Statement	ARRESTED FOR STEALING A SALAMI IN 1983, CHARGES WERE DISMISSED

End of Report

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