



## IAPD Report

# ERIC DONALD COFFMAN

CRD# 2206779

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Please contact FINRA with any concerns.



## 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 DONALD COFFMAN (CRD# 2206779)

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 **05/08/2026**.

### CURRENT EMPLOYERS

	Firm	CRD#	Registered Since
<b>B</b>	VALMARK SECURITIES, INC.	CRD# 31243	07/10/2003
<b>IA</b>	VALMARK ADVISERS, INC.	CRD# 108050	03/04/2004

### QUALIFICATIONS

This representative is currently registered in **1** SRO(s) and **10** 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
<b>B</b>	FIDELITY BROKERAGE SERVICES LLC	7784	SMITHFIELD, RI	02/05/1993 - 08/06/2002
<b>B</b>	OLDE DISCOUNT CORPORATION	5979	DETROIT, MI	05/01/1992 - 01/30/1993

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
Customer Dispute	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 **10** jurisdiction(s) and 1 SRO(s) through his or her employer(s).

### Employment 1 of 2

Firm Name: **VALMARK ADVISERS, INC.**  
Main Address: 130 SPRINGSIDE DRIVE  
SUITE 300  
AKRON, OH 44333  
Firm ID#: 108050

	Regulator	Registration	Status	Date
IA	California	Investment Adviser Representative	Approved	01/13/2020
IA	Colorado	Investment Adviser Representative	Approved	03/11/2004
IA	Florida	Investment Adviser Representative	Approved	07/13/2005
IA	Kansas	Investment Adviser Representative	Approved	06/09/2023
IA	Michigan	Investment Adviser Representative	Approved	05/30/2023
IA	North Carolina	Investment Adviser Representative	Approved	11/09/2020
IA	Ohio	Investment Adviser Representative	Approved	03/04/2004
IA	South Carolina	Investment Adviser Representative	Approved	02/05/2025
IA	Virginia	Investment Adviser Representative	Approved	06/13/2023
IA	Washington	Investment Adviser Representative	Approved	04/01/2022

### Branch Office Locations

**VALMARK ADVISERS, INC.**  
33 Merz Blvd  
Suite 100  
Fairlawn, OH 44333



## Qualifications

### Employment 2 of 2

Firm Name: **VALMARK SECURITIES, INC.**  
 Main Address: 130 SPRINGSIDE DRIVE  
 SUITE 300  
 AKRON, OH 44333-2431  
 Firm ID#: 31243

Regulator	Registration	Status	Date
<b>B</b> FINRA	General Securities Representative	Approved	07/10/2003
<b>B</b> FINRA	General Securities Sales Supervisor	Approved	07/10/2003
<b>B</b> FINRA	General Securities Principal	Approved	11/05/2003
<b>B</b> California	Agent	Approved	01/13/2020
<b>B</b> Colorado	Agent	Approved	04/13/2021
<b>B</b> Florida	Agent	Approved	06/09/2006
<b>B</b> Kansas	Agent	Approved	06/09/2023
<b>B</b> Michigan	Agent	Approved	04/26/2017
<b>B</b> North Carolina	Agent	Approved	11/09/2020
<b>B</b> Ohio	Agent	Approved	07/11/2003
<b>B</b> South Carolina	Agent	Approved	10/22/2024
<b>B</b> Virginia	Agent	Approved	06/13/2023

### Branch Office Locations

33 Merz Blvd  
 Suite 100  
 Fairlawn, OH 44333

Akron, OH



## 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 4 principal/supervisory exams, 2 general industry/product exams, and 2 state securities law exams.**

#### Principal/Supervisory Exams

Exam	Category	Date
General Securities Sales Supervisor - Options Module Examination (S9)	Series 9	01/02/2023
General Securities Sales Supervisor - General Module Examination (S10)	Series 10	01/02/2023
General Securities Principal Examination (S24)	Series 24	11/04/2003
General Securities Sales Supervisor Examination (Options Module & General Module) (S8)	Series 8	08/21/1995

#### General Industry/Product Exams

Exam	Category	Date
Securities Industry Essentials Examination (SIE)	SIE	10/01/2018
General Securities Representative Examination (S7)	Series 7	04/28/1992

#### State Securities Law Exams

Exam	Category	Date
Uniform Investment Adviser Law Examination (S65)	Series 65	08/29/1997
Uniform Securities Agent State Law Examination (S63)	Series 63	05/21/1992

### PROFESSIONAL DESIGNATIONS

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

Certified Financial Planner

This representative holds or did hold **1** professional designation(s) that may have been used to qualify as an Investment Advisor



representative. Please check with the appropriate designation authority for verification that the designation is still in effect. The contact information for these professional designation authorities can be found on the website for the North American Securities Administrators Association at <http://www.nasaa.org>



## Registration & Employment History

### PREVIOUSLY REGISTERED WITH THE FOLLOWING FIRMS

This representative held registrations with the following firms:

	Registration Dates	Firm Name	ID#	Branch Location
B	02/05/1993 - 08/06/2002	FIDELITY BROKERAGE SERVICES LLC	CRD# 7784	SMITHFIELD, RI
B	05/01/1992 - 01/30/1993	OLDE DISCOUNT CORPORATION	CRD# 5979	DETROIT, MI

### 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
01/2019 - Present	Wealth Impact Partners	Registered Representative	Y	Akron, OH, United States
04/2009 - Present	VALMARK SECURITIES, INC.	REGISTERED REPRESENTATIVE	Y	AKRON, OH, United States
03/2004 - Present	VALMARK ADVISERS, INC.	INVESTMENT ADVISER	Y	AKRON , OH, United States
04/2009 - 12/2018	POITINGER, REDMOND, LYONS, KURA, WALKER & COMPANY	REGISTERED 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.) COFFMAN FINANCIAL; 33 Merz Blvd. #100 , FAIRLAWN, OH 44333; WEALTH MANAGEMENT;INVESTMENT RELATED: YES;START DATE: 03/2011; HOURS PER MONTH: 40+;CLIENT INVOLVEMENT: YES, WEALTH ADVISOR; COFFMAN FINANCIAL IS MY CORPORATION WHICH RECIEVES MY CONSULTING, INVESTMENT AND INSURANCE COMPENSATION: I AM THE SOLE SHAREHOLDER; MY COMPENSATION FROM VALMARK AND CONSULTING IS PAID INTO COFFMAN FINANCIAL.///

2.) Insurance producer; sale of non-variable life insurance products and group voluntary insurance products with various carriers; commission compensation. 1-5 hours per month; not investment related.///

3.) Wealth Impact Advisors, LLC; 33 Merz Blvd., Suite 100, Fairlawn, OH 44333; Treasurer; Maintain books, oversee cash flow and overhead; NOT Investment Related; Start Date 4/14/2016; I am a 40% owner but there is no real share value. Any money not distributed to pay expenses as of 12.31 each year is distributed to LLC owners as K-1 distributions; Approximately 1-5 hrs. per month; I receive K-1 income based upon my share of undistributed money in the checking account.///

4.) Urban Vision; 749 Blaine Ave, Akron, OH 44310; Charitable organization; Board Member; Serve on the finance committee and provide feedback regarding financial matters related to operations and serve as another set of eyes on the financial statements; NOT Investment Related; Start Date 04/2025; Approximately 1-5 hrs. per month; Receive no compensation.///



## Registration & Employment History



### OTHER BUSINESS ACTIVITIES

5.) LifeWise Academy - Akron; PO Box 1179, Hilliard, OH 43026; provides released time religious instruction for public school students; Leadership Board; I am a member of the local leadership board of LifeWise Academy for the Akron Public School District, I assist the other board members in raising awareness of the educational services now being offered and recruiting other board members and supporters; NOT Investment Related; Start Date 04/01/2026; Approximately 6-10 hrs. per month; I am not being compensated.///



## 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
Customer Dispute	1

### Customer Dispute

This section provides information regarding a customer dispute that was reported to the Investment Adviser Registration Depository (IARD) by the Investment Adviser Representative (IAR), an investment adviser and/or securities firm, and/or a securities regulator. The event may include a consumer-initiated, investment-related complaint, arbitration proceeding or civil suit that contains allegations of sales practice violations against the individual.

The customer dispute may be pending or may have resulted in a civil judgment, arbitration award, monetary settlement, closure without action, withdrawal, dismissal, denial, or other outcome.

#### Disclosure 1 of 1

<b>Reporting Source:</b>	Individual
<b>Employing firm when activities occurred which led to the complaint:</b>	Valmark Securities, Inc.
<b>Allegations:</b>	Client alleges that in 2019 instructions to stop automatic income distributions set up on her account were not executed and as a result suffered losses in the form of extra taxes owed and additional Medicare expenses in 2021 from inflated 2019 income.
<b>Product Type:</b>	Other: Managed account
<b>Alleged Damages:</b>	\$17,790.52
<b>Is this an oral complaint?</b>	No
<b>Is this a written complaint?</b>	Yes
<b>Is this an arbitration/CFTC reparation or civil litigation?</b>	No

### Customer Complaint Information

<b>Date Complaint Received:</b>	06/26/2020
<b>Complaint Pending?</b>	No
<b>Status:</b>	Settled
<b>Status Date:</b>	08/13/2020
<b>Settlement Amount:</b>	\$17,790.52
<b>Individual Contribution Amount:</b>	\$5,000.00



**Broker Statement**

An amicable settlement was reached with the client.



## End of Report

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