

Summer Roberts
Investment Adviser Representative
dba Impact Partners Financial, LLC

Located at:

3027 Marina Bay Dr. Suite 301
League City, Texas 77573

Main: (602) 449-0146
Fax: (623) 321-1064

summer@impactpartnersfinancial.com
www.impactpartnersfinancial.com

Supervised From:

4050 E. Cotton Center Blvd., Suite 40
Phoenix, AZ 85040
Main: (480) 626-2979
Fax: (480) 747-9661

www.fiwealth.com

06/22/2023

Form ADV Part 2B Brochure Supplement

This Brochure Supplement provides information about Summer Roberts that supplements the Foundations Investment Advisors, LLC Brochure. You should have received a copy of that Brochure. Please contact us at (480) 626-2979 if you did not receive Foundations Investment Advisors, LLC Brochure or if you have any questions about the contents of this supplement.

Additional information about Summer Roberts is available on the SEC's website at www.adviserinfo.sec.gov. Mr. Roberts's CRD number is 7092097.

Educational Background and Business Experience - Item 2

Summer Roberts

Year of Birth: 1981

Formal Education after High School:

- Southern Methodist University, – Bachelor of Arts in Anthropology – 2005

Business Background:

- Foundations Investment Advisors, LLC; Investment Advisor Representative; 06/2023 – Present
- Impact Partners Financial, LLC; Chief Executive Officer; 05/2010 – Present
- AE Wealth Management; Investment Adviser Representative; 04/2019 – 06/2023
- Brooke Companies; Sales Manager; 11/2006 – 05/2010

Disciplinary Information - Item 3

Investment adviser representatives are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of Ms. Roberts and Foundations Investment Advisors, LLC. Ms. Roberts has no material events to disclose.

Other Business Activities - Item 4

Ms. Roberts is a licensed insurance agent and can effect transactions in insurance products and earn compensation for these activities. The firm expects that clients to whom it offers advisory services may also be clients for whom Ms. Roberts acts as an insurance agent. Clients are instructed that the fees paid to the firm for advisory services are separate and distinct from the commissions earned by its Investment Adviser Representatives for placing the client in insurance products. Clients to whom the firm offers advisory services are informed that they are under no obligation to purchase insurance services from Ms. Roberts and may use the insurance brokerage firm and agent of their choice.

Ms. Roberts serves as the President & Chairman of Lola Business Development, a business development consulting company.

Ms. Roberts has no relationships or affiliations with any other companies or individuals that would lead to a conflict of interest for the client.

Additional Compensation – Item 5

Other than what is noted in Item 4 above, Ms. Roberts does not receive additional compensation or economic benefits from third party sources in connection with his advisory activities.

Supervision - Item 6

Ms. Roberts is an investment adviser representative of Foundations Investment Advisors, LLC (FIA), and is supervised by Ernest C’DeBaca, FIA’s Chief Compliance Officer.

FIA has implemented a Code of Ethics and an internal compliance program that guides each Associated Person in meeting their fiduciary obligations to clients. Ms. Roberts adheres to FIA's Code of Ethics and compliance manual as mandated.

Additionally, FIA is subject to regulatory oversight by various agencies. These agencies require registration by FIA and its employees. As a registered entity, FIA is subject to examinations by regulators, which may be announced or unannounced. FIA is required to periodically update the information provided to these agencies and to provide various reports regarding firm business and assets under management.