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## ADV Part 2B: Brochure Supplement- June 2014

This brochure supplement provides information about Anita M. Buerkle and supplements the BPU Investment Management Inc. (BPU) brochure. You should have received a copy of that brochure. Please contact the Chief Compliance Officer, at 412-288-9150, if you did not receive one or should you have any questions about the content of this supplement.

Additional Information about the firm is available on the U.S. Securities and Exchange Commission's (SEC) website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).



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## **ANITA M. BUERKLE**

**Assistant Vice President and Financial Advisor**



### **ADDRESS AND PHONE**

BPU Investment Management, Inc.  
45 East Main Street, Suite 400  
Uniontown, PA 15401  
724-439-8771

### **EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE**

**Anita M. Buerkle**

**Year of Birth:** 1947

**Formal Education:**

Bachelor of Science in Business, University of Pittsburgh, 1969

Master of Business Administration, Joseph M. Katz School of Business, University of Pittsburgh, 1983

**Business Background:**

Ms. Buerkle is a financial advisor in the Greensburg Office of BPU Investment Management Inc. (BPU). Prior to joining BPU in 2007 as Assistant Vice President and Financial Consultant, Ms. Buerkle was a financial consultant for Janney Montgomery Scott LLC (formerly Parker Hunter Inc.) for 15 years. She received her broker training and securities licenses in the Professional Development Program at Merrill Lynch.

### **DISCIPLINARY INFORMATION**

Registered Investment Advisors are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of Ms. Buerkle providing investment advice. There is no information regarding Ms. Buerkle to disclose applicable to this item.

### **OTHER BUSINESS ACTIVITIES**

Ms. Buerkle is a registered representative of BPU Investment Management Inc. for which she may receive separate, yet customary compensation for effecting securities transactions. This compensation may include brokerage commissions, distribution/service fees and other fees. While BPU Investment Management Inc. and Ms. Buerkle endeavor at all times to put the interest of clients first as part of their fiduciary duty, clients should be aware the receipt of additional compensation itself creates a conflict of interest and may affect the judgment of Ms. Buerkle when making recommendations.

Additionally Ms. Buerkle is an agent for insurance companies. She can therefore receive separate, yet customary compensation resulting from insurance transactions implemented on behalf of advisory clients.



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#### **ADDITIONAL COMPENSATION**

It is BPU Investment Management Inc.'s policy not to allow supervised persons to accept any form of compensation, including cash, sales awards or other prizes, from a non-client in conjunction with the advisory services we provide to our clients.

#### **SUPERVISION**

Ms. Buerkle is supervised by Paul J. Brahim, CEO. Mr. Brahim reviews all financial plan recommendations before the financial plan is complete. He has frequent interactions with Ms. Buerkle and is responsible for Ms. Buerkle's annual review. Advisory clients may contact Mr. Brahim directly at 412-288-9150.