

*Item 1 – Cover Page*



**Brochure Supplement 2022**

Scott J Zollo, CFA  
1701 Chili Ave  
Rochester NY 14624  
585-235-3600

This Brochure supplement provides information about Scott Zollo that supplements the Core Alpha, Inc. brochure. You should have received a copy of that brochure. Please contact Scott Zollo if you did not receive Core Alpha's brochure or if you have any questions about the contents of this supplement.

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

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

Scott J Zollo President & Chief Investment Officer- Date of Birth 12/15/1971

### ***Education***

BS in Finance from Rochester Institute of Technology, 1994

MS in Finance from Rochester Institute of Technology, 1996

Chartered Financial Analyst (CFA) 1999. Please see [www.cfainstitute.org](http://www.cfainstitute.org) more information on this professional designation.

FINRA Examinations: Series 6(10.18.91); Series 62(12.15.97); Series 63(1.24.92); Series 24(11.3.98) Please see [www.finra.org](http://www.finra.org) more information on these FINRA licenses.

New York State Life & Health insurance license (8.13.93) -Please see <http://www.ins.state.ny.us> more information on NY state insurance licenses.

### ***Employment***

Scott Zollo was the senior manager for Accu-Vest Planning and Mutual Funds Associates from 1994 to 2008. In 2008, he became president of both firms. Scott Zollo became President and Chief Investment Officer of Core Alpha, Inc in 2000.

## ***Item 3 - Disciplinary information***

Scott J Zollo doesn't have any legal or disciplinary events.

## ***Item 4 - Other Business Activities***

Scott J Zollo is a licensed registered representative with Mutual Funds Associates, Inc., a Broker Dealer, which recommends commission based financial products to its clients. He is also a licensed insurance agent with Accu-Vest Planning Inc. which recommends commission based insurance products to its clients. While there exists a conflict of interest in Mr Zollo's relationship with Mutual Fund Associates, Inc. and Accu-Vest Planning, Inc., Core Alpha always puts the interest of its clients first. However, the client should be aware of this relationship and that Mr. Zollo will receive additional compensation in the form of commissions as a registered broker dealer agent and registered insurance agent.

## ***Item 5- Additional Compensation***

Scott Zollo is paid by Mutual Funds Associates, Inc. for referring clients to Core Alpha, Inc. based on assets under management.

## ***Item 6 – Supervision***

The activities of Scott Zollo, President, will be supervised by Sean Collins.

## ***Item 7 - Required for State-Registered Advisors***

Scott J Zollo doesn't have any legal, bankruptcy, or disciplinary events.