This brochure supplement provides information about Robert Montgomery Perry that supplements the PFG Private Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Robert Montgomery Perry if you did not receive PFG Private Wealth Management, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Robert Montgomery Perry is also available on the SEC's website at www.adviserinfo.sec.gov.

PFG Private Wealth Management, LLC

Form ADV Part 2B – Individual Disclosure Brochure

for

Robert Montgomery Perry

Personal CRD Number: 1039834

Investment Adviser Representative

PFG Private Wealth Management, LLC
18572 N. Dale Mabry Highway
Lutz, FL 33548
(813) 286-7776
Robert@pfgprivatewealth.com

UPDATED: 02/27/2024

Item 2: Educational Background and Business Experience

Name: Robert Montgomery Perry **Born:** 1944

Educational Background and Professional Designations:

Education:

BA History, Wake Forest University - 1966

Designations:

ChFC®- Chartered Financial Consultant®

ChFC® MINIMUM QUALIFICATIONS:

- Bachelor's degree or its equivalent, in any discipline, from an accredited university, this qualifies as one year of business experience
- Three years of full-time business experience is required; this three-year period must be withinthe five years preceding the date of the award (part-time qualifying business experience is also credited toward the three-year requirement with 2,000 hours representing the equivalent of one year full-time experience).
- Must fulfill the ChFC® seven course curriculum, as well as two additional elective courses
- Pass the exams for all required and elective courses
- Pass a background check and candidate fitness standards test. You must reveal any criminal history, pending litigation or ethical violations. The CFP board verifies all employment history, qualifications and disciplinary issues via FINRA's Central Registration Depository.

AEP® - Accredited Estate Planner®

The AEP® designation is a graduate-level specialization in estate planning, obtained in addition to already recognized professional credentials within the various disciplines of estate planning who support the team concept of estate planning. It is awarded to estate planning professionals who meet stringent requirements of experience, knowledge, education, professional reputation, and character.

EDUCATIONAL REQUIREMENTS:

2 graduate-level courses administered by The American College or from another accredited graduate program as part of a master's or doctoral degree unless applicant has 15 or more years' experience as an estate planner.

PREREQUISITES/EXPERIENCE:

Candidates must meet all of the following requirements:

- Must be an attorney (JD), accountant (CPA), insurance professional or financial planner (CLU®, ChFC®, CFP® certificant) or trust officer (CTFA)

- Must be in good standing with their professional organization, not be subject to disciplinary investigation, and provide three professional recommendations
- Must be presently and significantly engaged in estate planning activities and have a minimum of 5 years' experience in estate planning in one or more of the prerequisite professions
- AEP® designees must maintain membership in NAEPC.

CLU®- Chartered Life Underwriter®

CLU stands for Chartered Life Underwriter and is awarded by The American College. The course of study involved in this designation provides in-depth knowledge on the insurance needs of individuals, business owners and professional clients.

MINIMUM QUALIFICATIONS:

- Once fulfilling the ChFC® designation, one may also earn the CLU® designation by completing a minimum of three additional courses.
- For the CLU®, one must complete the remaining core courses and select from the electives list for that program if additional courses are still needed; electives in the ChFC® program may not be used as electives in the CLU® program.

Business Background:

12/2015 - Present	Chairman PFG Private Wealth Management, LLC
01/1969- 12/2020	Partner Perry Financial Group
04/2016 – 05/2017	Registered Representative Mutual Securities, Inc.
11/2009 – 03/2016	Investment Advisor Representative Cambridge Investment Research Advisors, Inc.
11/2009 – 03/2016	Registered Representative Cambridge Investment Research, Inc.
02/1983 - 11/2009	Registered Representative / Investment Advisor Representative MML Investors Services, Inc.

Item 3: Disciplinary Information

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

Item 4: Other Business Activities

Robert Montgomery Perry is a licensed insurance agent. From time to time, he will offer clients advice or products from this activity. Clients should be aware that these services pay a commission and involve a possible conflict of interest, as commissionable products can conflict with the fiduciary duties of a registered investment adviser. PFG Private Wealth Management, LLC always acts in the best interest of the client, including in the sale of commissionable products to advisory clients. Clients are in no way required to implement the plan through any representative of PFG Private Wealth Management, LLC in their capacity as a licensed insurance agent.

Robert Montgomery Perry is Board Member of a non-profit, The Tampa Bay Baptist Foundation. Mr. Perry devotes 1 hour per month of his time to this outside activity.

Item 5: Additional Compensation

Robert Montgomery Perry does not receive any economic benefit from any person, company, or organization, other than PFG Private Wealth Management, LLC in exchange for providing clients advisory services through PFG Private Wealth Management, LLC.

Item 6: Supervision

As a representative of PFG Private Wealth Management, LLC, Robert Montgomery Perry is supervised by Jeffrey D Perry, the firm's Chief Compliance officer. Jeffrey D Perry is responsible for ensuring that Robert Montgomery Perry adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Jeffrey Perry is (813) 286-7776.