This brochure supplement provides information about Jeffrey Douglas Perry that supplements the PFG Private Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Jeffrey Douglas 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 Jeffrey Douglas 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

Jeffrey Douglas Perry

Personal CRD Number: 3109224

Investment Adviser Representative

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

UPDATED: 02/27/2024

Item 2: Educational Background and Business

Name: Jeffrey Douglas Perry **Born:** 1973

Educational Background and Professional Designations:

Education:

BA Economics, Wake Forest University – 1995

Designations:

CIMA® - Certified Investment Management Analyst®

- The CIMA® certification signifies that an individual has met initial and ongoing experience, ethical, education, and examination requirements for investment management consulting, including advanced investment management theory and application. To earn the CIMA® certification, candidates must submit an application, pass a background check and have an acceptable regulatory history; complete an in-person or online executive education program through a Registered Education Provider; pass an online Certification Examination; Pass a second background check; and have three years of financial services experience at the time of certification.

- CIMA® certificants must adhere to Investments & Wealth Institute's Code of Professional Responsibility, and Rules and Guidelines for Use of the Marks. CIMA® designees must report 40 hours of continuing education credits, including two ethics hours, every two years to maintain the certification.

AIF® - Accredited Investment Fiduciary®

The AIF Designation certifies that the recipient has specialized knowledge of fiduciary standards of care and their application to the investment management process. To receive the AIF Designation, the individual must meet prerequisite criteria based on a combination of education, relevant industry experience, and/or ongoing professional development, complete a training program, successfully pass a comprehensive, closed-book final examination under the supervision of a proctor and agree to abide by the Code of Ethics and Conduct Standards. In order to maintain the AIF Designation, the individual must annually attest to the Code of Ethics and Conduct Standards, and accrue and report a minimum of six hours of continuing education. The Designation is administered by the Center for Fiduciary Studies, the standards-setting body of fi360.

CFS®- Certified Fund Specialist

MINIMUM QUALIFICATIONS

- To earn this designation, candidates must have at least 2,000 hours of work experience in the financial services industry or a bachelor's degree from an accredited college or university. The designation will not be granted until the required minimum number of hours has been fulfilled or a bachelor's degree has been granted.
- Pass three exams; each one covers two of the six modules
- Complete one open-book study (a one page set of facts based on a hypothetical client)
- Fill out a registration form and complete a student questionnaire, and
- Sign a code of ethics

Business Background:

12/2015 - Present	President/CEO PFG Private Wealth Management, LLC
07/1999 – 12/2020	Partner Perry Financial Group
04/2016 – 11/2017	Registered Representative Mutual Securities, Inc.
11/2009 – 03/2016	Investment Advisor Representative Cambridge Investment Research Advisors, Inc.
08/1998 - 11/2009	Registered Representative / Investment Adviser Representative MML Investors Services, Inc.
08/1998 - 11/2009	Insurance Agent MassMutual Life Insurance Company

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

Jeffrey Douglas 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.

Item 5: Additional Compensation

Jeffrey Douglas 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 the Chief Compliance Officer of PFG Private Wealth Management, LLC, Jeffrey Douglas Perry supervises all activities of the firm. Jeffrey Douglas Perry's contact information is on the cover page of this disclosure document. Jeffrey Douglas Perry adheres to applicable regulatory requirements, together with all policies and procedures outlined in the firm's code of ethics and compliance manual. Adviser Andrew Whitten reviews Jeff Perry's CCO activities as needed.