

This brochure supplement provides information about Nicholas Joseph Pinelli that supplements the Jacksonville Wealth Management brochure. You should have received a copy of that brochure. Please contact Nicholas Joseph Pinelli if you did not receive Jacksonville Wealth Management's brochure or if you have any questions about the contents of this supplement.

Additional information about Nicholas Joseph Pinelli is also available on the SEC's website at www.adviserinfo.sec.gov.



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Jacksonville Wealth Management

Form ADV Part 2B – Individual Disclosure Brochure

for

Nicholas Joseph Pinelli

Personal CRD Number: 6800695

Investment Adviser Representative

Jacksonville Wealth Management

8075 Gate Parkway West

Jacksonville, FL 32216

(904) 378-6615

nick@jaxwealth.com

UPDATED: 04/18/2023

Item 2: Educational Background and Business Experience

Name: Nicholas Joseph Pinelli

Born: 1996

Educational Background and Professional Designations:

Education:

Bachelor of Arts Business Administration General studies, University of Florida - 2018

Designations:

CFP® - Certified Financial Planner

The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP (with flame design) marks (collectively, the “CFP® marks”) are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”).

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- Education – Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board’s studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a Bachelor’s Degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP Board’s financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;
- Examination – Pass the comprehensive CFP® Certification Examination. The examination includes case studies and client scenarios designed to test one’s ability to correctly diagnose financial planning issues and apply one’s knowledge of financial planning to real world circumstances;
- Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
- Ethics – Agree to be bound by CFP Board’s *Standards of Professional Conduct*, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- i. Continuing Education – Complete 30 hours of continuing education hours every two years, including two hours on the *Code of Ethics* and other parts of the *Standards of Professional Conduct*, to maintain competence and keep up with developments in the financial planning field; and
- ii. Ethics – Renew an agreement to be bound by the *Standards of Professional Conduct*. The Standards prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board’s enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

Business Background:

03/2021 - Present	Investment Advisor Representative Jacksonville Wealth Management
05/2018 - Present	Administrative Associate LPL Financial
05/2018 – 03/2021	Administrative Associate Private Advisors Group LLC
08/2016 - 05/2018	Student
06/2015 - 02/2018	Cashier Publix
08/2014 - 07/2016	Student
11/2014 - 06/2015	Inventory Specialist Brooks Brothers
08/2014 - 11/2014	Mystery Shopper University of North Florida Accounting
08/2014 - 10/2014	Customer Service Winn Dixie
08/2010 - 05/2014	Student

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

Nicholas Joseph Pinelli 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. Jacksonville Wealth Management 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 Jacksonville Wealth Management in their capacity as a licensed insurance agent.

Item 5: Additional Compensation

Nicholas Joseph Pinelli does not receive any economic benefit from any person, company, or organization, other than Jacksonville Wealth Management in exchange for providing clients advisory services through Jacksonville Wealth Management.

Item 6: Supervision

As a representative of Jacksonville Wealth Management, Nicholas Joseph Pinelli is supervised by Daniel Martin Ciez, the firm's Chief Compliance Officer. Daniel Martin Ciez is responsible for ensuring that Nicholas Joseph Pinelli 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 Daniel Martin Ciez is (904) 923-7526.