

Cover Page



CURTIS "DEAN" CONE, SR.

**556 Third Street
Ayden, NC 28513**

Phone: (252) 746-6785

February 28, 2024

**FORM ADV PART 2
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Curtis "Dean" Cone, Sr. that supplements the Cone Advisory Group, Inc. brochure. You should have received a copy of that brochure.

Please contact Curtis "Dean" Cone, Sr. if you did not receive a Cone Advisory Group, Inc.'s brochure or if you have questions about this supplement. Mr. Cone's CRD number is 1684250.

Additional information about Curtis "Dean" Cone, Sr. is also available on the SEC's website at www.adviserinfo.sec.gov.

Form ADV, Part 2B, Item 2

Educational Background and Business Experience

Curtis "Dean" Cone, Sr.
President and CCO
Year of Birth: 1963

Business Background:

Cone Advisory Group, Inc., President and CCO, July 2018 - Present

Symmetry Partners, Investment Advisor Representative, November 2013 - Present

The Journeys Group, Partner, November 2009 – August 2021

AlphaStar Capital Management, LLC, Investment Advisor Representative, June 2017 –
December 2018

Lincoln Financial Securities Corporation, Registered Representative, July 2008 – January 2012

Lincoln Financial, Agent, April 2006 – January 2012

Educational Background:

Barton College (formerly Atlantic Christian College), BS Business Administration, 1985

Form ADV, Part 2B, Item 3

Disciplinary Information

Mr. Cone does not have any reportable disciplinary disclosures.

Form ADV, Part 2B, Item 4

Other Business Activities

Curtis "Dean" Cone, Sr. has a financial industry affiliated business as an independent insurance agent. Not more than 50% of his time is spent on these activities. From time to time, he offers clients advice or products from those activities. He may receive separate yet typical compensation in the form of commissions for the sale of insurance products.

These practices represent a conflict of interest because it gives Mr. Cone an incentive to recommend products based on the commission amount received. This conflict is mitigated by the fact that Mr. Cone has a fiduciary responsibility to place the best interest of the client first and the clients are not required to purchase any products. Clients have the option to purchase these products through another insurance agent of their choosing.

Curtis "Dean" Cone, Sr. is co-owner of White Willow Properties, LLC. He is also the sole owner of C2 Farms, LLC, a holding entity for a farm. Additionally, Curtis "Dean" Cone, Sr. is the co-owner of CCGJ, LLC and is also owned by George Pate. CCGJ, LLC is a real estate management company. We do not recommend the services of CCGJ, LLC. Mr. Cone's duties as the managing member of CCGJ, LLC do not create a conflict of interest to his provision of advisory services through Cone Advisory Group, Inc.

Curtis "Dean" Cone, Sr. will recommend that you use Symmetry Partners, LLC based on your needs and will receive compensation from Symmetry Partners, LLC for recommending that you use their services. These compensation arrangements present a conflict of interest because Mr. Cone has a financial incentive to recommend the services of Symmetry Partners, LLC and dedicates approximately 60 hours per month to Symmetry Partners, LLC. You are not obligated, contractually or otherwise, to use the services of any third party adviser that Mr. Cone recommends.

Form ADV, Part 2B, Item 5

Additional Compensation

Curtis "Dean" Cone, Sr. does not receive any economic benefit from anyone, who is not a client, for providing advisory services.

Form ADV, Part 2B, Item 6

Supervision

Cone Advisory Group, Inc. has written supervisory procedures in place that are reasonably designed to detect and prevent violations of the securities laws, rules, and regulations of the North Carolina Securities Act. Mr. Cone is Cone Advisory Group, Inc.'s Chief Compliance Officer and the sole Investment Advisory Representative ("IAR") of the firm, therefore he is responsible for all of the activities that occur on behalf of Cone Advisory Group, Inc. and its clients. Mr. Cone can be reached at (252) 746-6785.

Form ADV, Part 2B, Item 7

Requirements for State-Registered Advisers

Curtis “Dean” Cone, Sr. does not have any reportable disciplinary events required to be disclosed in this section.