

**Item 1: Cover Page  
Part 2B of Form ADV: Brochure Supplement  
March 2024**



**Martin Eugenio Palomo IV**

**Argent Wealth, LLC  
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www.myargentwealth.com  
Firm Contact:  
Carol Brock  
Chief Compliance Officer**

This brochure supplement provides information about Mr. Palomo that supplements our brochure. You should have received a copy of that brochure. Please contact Ms. Brock if you did not receive Argent Wealth, LLC's brochure or if you have any questions about the contents of this supplement. Additional information about Mr. Palomo is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching CRD #4995216.

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## Item 2: Educational Background & Business Experience

### Martin Palomo

Year of Birth: 1983

#### Educational Background:

- 2019: Millsaps College; Executive Master's in Business Administration, Business
- 2006: Millsaps College; Bachelor of Business Administration, Finance
- 2004: Holmes Community College; Associate of Arts in Chemical Engineering

#### Business Background:

- 05/2021 – Present Argent Wealth, LLC; Chief Executive Officer
- 09/2013 – 05/2021 Pinnacle Trust; President & Chief Investment Officer
- 02/2016 – 12/2016 Voya Financial Advisors, Inc.; IAR and RR
- 06/2014 – 09/2015 Voya Financial Advisors, Inc.; IAR and RR
- 09/2013 – 04/2014 Cetera Investment Services, LLC; Financial Advisor
- 11/2011 – 09/2013 Edward Jones; Financial Advisor

#### Exams, Licenses & Other Professional Designations:

- 2019: Series 65 Exam
- 2014: Certified Wealth Strategist, CWS®
- 2011: Series 7 & 66 Exams
- 2011: Mississippi Life, Accident, & Health Insurance Licensed, License # 10000759

#### Certified Wealth Strategist, CWS®

The CWS® was designed to respond to an industry need for a practitioner oriented, application-based certification experience. The CWS® program makes sure that each of the professionals are competent and confident in bringing up issues that high net worth individuals face. Pre-requisites for CWS® are: 3+ years' experience in the financial services industry, must have significant experience in a client-facing role, or a 4-year degree from an accredited school. It's strongly recommend you have one of the following: Series 6, Series 7, Series 65, CPA License, Attorney License, Chartered Life Underwriter, or Chartered Financial Consultant

CWS® program includes a 2 day instructor-led class CWS®I - Sales & Practice Management Skill and a self-directed Study on 13 Wealth Management Issues, 10 Study Guides and a Reference Guide – technical drill down, case studies, and discussion points with clients on each of 13 wealth management issues, 2 textbooks for supplemental reading (Concepts for Professionals & Critical Concerns of Estate Planners), Wealth Management Advisors Audio Series CD's, 10 interactive e-learning lessons (approximately 1 hour each), 10 technical assessments – about 30 questions each, 2 day instructor-led class CWS® II - Client Interaction Skills, Cannon interviews - Interviewing Techniques, Presentation Skills and the CAPSTONE Project - The final project is all about applying what you have learned. Training takes approximately 6 months – About 4 hours per week is typical.

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### Item 3: Disciplinary Information<sup>1</sup>

There are no legal or disciplinary events material to the evaluation of Mr. Palomo.

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### Item 4: Other Business Activities

Mr. Palomo works at Palomo Futbol Consulting, where he referees youth and high school soccer and directs tournaments.

Mr. Palomo is a licensed insurance agent. He may offer insurance products and receive customary fees as a result of insurance sales. A conflict of interest may arise as these insurance sales may create an incentive to recommend products based on the compensation earned. To mitigate this potential conflict, Mr. Palomo, as a fiduciary, will act in the client's best interest.

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### Item 5: Additional Compensation

Mr. Palomo does not receive any other economic benefit for providing advisory services in addition to advisory fees.

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### Item 6: Supervision

Carol Brock, Chief Operating Officer and Chief Compliance Officer of Argent Wealth, LLC, supervises and monitors Mr. Palomo's activities on a regular basis to ensure compliance with our firm's Code of Ethics. Please contact Ms. Brock if you have any questions about Mr. Palomo's brochure supplement at (601) 957-0323 or via email at [cbrock@myargentwealth.com](mailto:cbrock@myargentwealth.com).

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<sup>1</sup> Note: Our firm may, under certain circumstances, rebut the presumption that a disciplinary event is material. If an event is immaterial, we are not required to disclose it. When we review a legal or disciplinary event involving the advisor to determine whether it is appropriate to rebut the presumption of materiality, we consider all of the following factors: (1) the proximity of advisor to the advisory function; (2) the nature of the infraction that led to the disciplinary event; (3) the severity of the disciplinary sanction; and (4) the time elapsed since the date of the disciplinary event. If we conclude that the materiality presumption has been overcome, we prepare and maintain a file memorandum of our determination in our records. We follow SEC rule 204-2(a)(14)(iii) and similar state rules.