



## Part 2B Brochure Supplement

### Item 1 Cover Page

A.

**Daniel Confreda CPA/PFS®**

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New Rochelle, New York 10801  
212-490-4580  
<https://www.f2partners.com>

Private Advisor Group, LLC  
Part 2B - Brochure Supplement  
Dated 05/23/2023

Contact: James Hooks, Chief Compliance Officer  
Private Advisor Group, LLC  
65 Madison Avenue, Suite 300  
Morristown, New Jersey 07960  
973-538-7010  
[www.PrivateAdvisorGroup.com](http://www.PrivateAdvisorGroup.com)

B.

**This Brochure Supplement provides information about Daniel Confreda that supplements the Private Advisor Group, LLC Brochure. You should have received a copy of that Brochure. Please contact James Hooks, Chief Compliance Officer, if you did not receive Private Advisor Group, LLC's Brochure or if you have any questions about the contents of this supplement. Additional information about Daniel Confreda is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**



## Item 2 Education Background and Business Experience

Daniel Confreda was born in 1998.

### Education

Marist College

Bachelor of Science, 2020, Accounting and Business Administration with a concentration in Finance

### Business Experience

Retirement Services Associate, Flynn Financial Partners, Ltd  
2022 to present

Investment advisor representative, Private Advisor Group  
2023 to present

Registered representative, LPL Financial  
2023 to present

Tax Associate, Senior Tax Associate, PricewaterhouseCoopers LLP  
2020 - 2022

Delivery Driver (Dasher), DoorDash  
2020 - 2020

Wealth Management Intern, Morgan Stanley  
2019 - 2020

Tour Guide, Marist College Admissions  
2016 - 2019

### Designations

#### CPA/PFS®

Mr. Confreda is a CERTIFIED PUBLIC ACCOUNTANT (“CPA”). CPAs are licensed and regulated by their state boards of accountancy. While state laws and regulations vary, the education, experience and testing requirements for licensure as a CPA generally include minimum college education (typically 150 credit hours with at least a baccalaureate degree and a concentration in accounting), minimum experience levels (most states require at least one year of experience providing services that involve the use of accounting, attest, compilation, management advisory, financial advisory, tax or consulting skills, all of which must be achieved under the supervision of or verification by a CPA), and successful passage of the Uniform CPA Examination. In order to maintain a CPA license, states generally require the completion of 40 hours of continuing professional education (CPE) each year (or 80 hours over a two year period or 120 hours over a three year period). Additionally, all American Institute of Certified Public Accountants (AICPA) members are required to follow a rigorous Code of Professional Conduct which requires that they act with integrity, objectivity, due care, competence, fully disclose any conflicts of interest (and obtain client consent if a conflict exists), maintain client confidentiality, disclose to the client any commission or referral fees, and serve the public interest when providing financial services. The vast majority of state boards of accountancy have adopted the AICPA’s Code of Professional Conduct within their state accountancy laws or have created their own.



Mr. Confreda has held the designation of PERSONAL FINANCIAL SPECIALIST (PFS) since 2021. The PFS credential demonstrates that an individual has met the minimum education, experience and testing required of a CPA in addition to a minimum level of expertise in personal financial planning. To attain the PFS credential, a candidate must hold a CPA license, fulfill 3,000 hours of personal financial planning business experience, complete 80 hours of personal financial planning CPE credits, pass a comprehensive financial planning exam and be an active member of the AICPA. A PFS credential holder is required to adhere to AICPA's Code of Professional Conduct, and is encouraged to follow AICPA's Statement on Responsibilities in Financial Planning Practice. To maintain their PFS credential, the recipient must complete 60 hours of financial planning CPE credits every three years. The PFS credential is administered through the AICPA.

### Item 3 Disciplinary Information

None

### Item 4 Other Business Activities

- A. **Registered Representative of LPL Financial.** Mr. Confreda is a registered representative of LPL Financial, an SEC registered and FINRA member broker-dealer which acts as a qualified custodian. Clients may choose to engage Mr. Confreda in his individual capacity as a registered representative of LPL Financial to implement investment recommendations on a commission basis. Clients may also choose to custody investment assets with LPL Financial.
1. **Conflict of Interest.** When Mr. Confreda recommends that a client purchase investment products on a commission basis or custody assets with a particular custodian, that recommendation presents a ***conflict of interest***, as Mr. Confreda may receive a financial benefit from LPL Financial, and therefore have an incentive to recommend investment products based on commissions or other compensation to be received, rather than on a particular client's need. No client is under any obligation to purchase any commission products from Mr. Confreda. Clients are reminded that they may purchase investment products recommended by Registrant through other, non-affiliated broker dealers, and may choose to custody investment assets through non-affiliated custodians. **The Registrant's Chief Compliance Officer, James Hooks, remains available to address any questions that a client or prospective client may have regarding the above conflict of interest.**
  2. **Commissions.** In the event the client chooses to purchase investment products through a brokerage account with LPL Financial, brokerage commissions will be charged by LPL Financial to effect securities transactions, a portion of which commissions shall be paid by LPL Financial to Mr. Confreda. The brokerage commissions charged by LPL Financial may be higher or lower than those charged by other broker-dealers. In addition, LPL Financial, as well as Registrant's Associated Persons, relative to commission mutual fund purchases, may also receive additional ongoing 12b-1 trailing commission compensation directly from the mutual fund company during the period that the client maintains the mutual fund investment. The securities commission business conducted by Mr. Confreda is separate and apart from Registrant's investment management services discussed in the Registrant's Brochure.
  3. **Other Compensation.** In the event the client chooses to purchase investment products through a brokerage account with LPL Financial, or custody investment assets with LPL Financial, Mr. Confreda may receive compensation other than commissions from LPL Financial. Other compensation may include bonuses based on production, stock options to purchase shares of LPL Financial's parent company, LPL Investment Holdings Inc., reimbursement of fees that your financial advisor pays to LPL Financial for items such as administrative services, and other things of value such as free or reduced-cost marketing materials, payments in connection with the transition from another investment firm to LPL, or attendance at LPL Financial conferences and events. These types of compensation from LPL Financial may be based on overall business production and/or on the amount of assets serviced in LPL Financial advisory programs. Clients are reminded that they may



purchase investment products recommended by Registrant through other, non-affiliated broker dealers, and may choose to custody investment assets through non-affiliated custodians.

- B. **Certified Public Accountant.** Mr. Confreda is a Certified Public Accountant. To the extent that Mr. Confreda provides accounting services, which may include tax advice, to any clients, including clients of the Registrant, all such services shall be performed by Mr. Confreda, in his individual professional capacity, independent of the Registrant, for which services Registrant shall not receive any portion of the fees charged by Mr. Confreda, referral or otherwise. It is expected that Mr. Confreda, solely incidental to his practice as an accountant, may recommend the Registrant's services to certain of his clients. No client of Registrant is under any obligation to use the services of Mr. Confreda. **The Registrant's Chief Compliance Officer, James Hooks, remains available to address any questions that a client or prospective client may have regarding the above conflict of interest.**

### Item 5 Additional Compensation

Mr. Confreda may receive compensation from product sponsors. Compensation may include such items as gifts valued at less than \$100 annually, an occasional dinner or ticket to a sporting event, or reimbursement in connection with educational or training events or marketing or advertising initiatives. Such compensation may not be tied to the sale of any products.

### Item 6 Supervision

The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4)-7 policies and procedures is to comply with the supervision requirements of Section 203(e)(6) of the Investment Advisers Act ("Act"). The Registrant's Chief Compliance Officer, James Hooks, is primarily responsible for the implementation of the Registrant's policies and procedures and overseeing the activities of the Registrant's supervised persons. Should an employee, independent contractor, investment adviser representative, or solicitor of the Registrant have any questions regarding the applicability/relevance of the Act, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Mr. Hooks at 973-538-7010.

### Item 7 Additional Addresses

None