

Item 1 – Cover Page



Brett A. Power
Individual IARD# 5439950

Power Wealth Management LLC
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Alpharetta, GA 30009
(404) 889-8919
www.powerwm.com
www.powerwealthmanagement.com

March 2024

This brochure supplement provides information about Mr. Power that supplements the PWM brochure. You should have received a copy of that brochure. Please contact Mr. Power if you did not receive PWM's brochure or if you have any questions about the contents of this supplement.

Additional information about Mr. Power is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 - Educational Background and Business Experience

Brett A. Power, b. 1982

Education Background

University of Georgia – BA, Economics

Robinson College of Business, Georgia State University – MBA Chartered Financial Analyst® (CFA®)
CERTIFIED FINANCIAL PLANNER™ (CFP®)

The Chartered Financial Analyst® (CFA®) designation is issued by the CFA Institute after candidates pass three course exams involving 250 hours of self-study time for each of the three levels. In order to qualify to sit for the exams, candidates must have an undergraduate degree or four years of qualified professional experience or a combination of work and college experience that totals at least four years. Candidates are also required to sign a Professional Conduct Statement and a Candidate Responsibility Statement.

The CERTIFIED FINANCIAL PLANNER™ (CFP®) designation is issued by the Certified Financial Planner Board of Standards, Inc. Candidates are required to complete a CFP-board registered program. They must also pass the CFP Certification Examination. The exam 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. Certified individuals are required to complete 30 hours of continuing education every two years, including two hours on the Code of Ethics and other parts of the Standards of Professional Conduct. As a prerequisite to sitting for the CFP Certification Examination, candidates must hold a bachelor's degree (or higher) from an accredited college or university and have at least 3 years of full time personal financial planning experience.

Business Background

Firm	Position	Dates
Power Wealth Management LLC	President	2/2020 – Present
Kestra Advisory Services, LLC	Investment Adviser Representative	5/2018 – 2/2020
Kestra Investment Services, LLC	Registered Representative	5/2018 – 2/2020
Strategic Advisers LLC	Investment Adviser Representative	10/2010 – 5/2018
Fidelity Brokerage Services LLC	Registered Representative	10/2010 – 5/2018

Item 3 - Disciplinary Information

Investment Advisor Representatives are required to disclose all material facts regarding any legal and disciplinary events would be material to clients' and prospective clients' evaluation of the representative. Mr. Power has no information applicable to this Item.

Item 4 - Other Business Activities

Mr. Power is separately licensed as an independent insurance agent and spends as much as 10% of his time on these non-advisory activities. This poses a conflict to the extent that he has a financial incentive to recommend insurance products that result in commissions, trails or other payments. PWM is dedicated to acting in the clients' best interests based on fiduciary principles. Clients are under no obligation to purchase any recommended brokerage products or insurance products.

Item 5 - Additional Compensation

Mr. Power does not receive any compensation for advisory services other than fees paid by the client.

Item 6 - Supervision

PWM provides investment advisory and supervisory services in accordance with the Firm's policies and procedures manual. The primary purpose of PWM's policies and procedures is to comply with the supervision requirements of the Investment Adviser's Act ("Act"). Matthew Giggey, CCO, is primarily responsible for the implementation of the Firm's policies and procedures and overseeing the activities of the supervised persons and client accounts. Should a client have any questions regarding the Firm's supervision or compliance practices, please contact Matthew Giggey at 859-402-1462.

Item 1 – Cover Page



Ian J. Rivero
Individual IARD# 5690690

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March 2024

This brochure supplement provides information about Mr. Rivero that supplements the PWM brochure. You should have received a copy of that brochure. Please contact Mr. Power if you did not receive PWM's brochure or if you have any questions about the contents of this supplement.

Additional information about Mr. Rivero is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 - Educational Background and Business Experience

Ian J. Rivero, b. 1988

Education Background

The Colorado College – BA, Economics
CERTIFIED FINANCIAL PLANNER™ (CFP®)

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Business Background

Firm	Position	Dates
Power Wealth Management LLC	Investment Adviser Representative	03/2023 – Present
Calamos Wealth Management	VP, Senior Wealth Advisor	01/2017 – 03/2023
Baker Avenue Asset Management	Associate Director	01/2015 – 01/2017
Fidelity Brokerage Services LLC	Financial Representative	08/2010 – 05/2015

Item 3 - Disciplinary Information

Investment Advisor Representatives are required to disclose all material facts regarding any legal and disciplinary events would be material to clients' and prospective clients' evaluation of the representative. Mr. Rivero has no information applicable to this Item.

Item 4 - Other Business Activities

Mr. Rivero is separately licensed as an independent insurance agent and spends as much as 10% of his time on these non-advisory activities. This poses a conflict to the extent that he has a financial incentive to recommend insurance products that result in commissions, trails or other payments. PWM is dedicated to acting in the clients' best interests based on fiduciary principles. Clients are under no obligation to purchase any recommended brokerage products or insurance products.

Item 5 - Additional Compensation

Mr. Rivero does not receive compensation for advisory services other than fees paid by the client.

Item 6 - Supervision

PWM provides investment advisory and supervisory services in accordance with the Firm's policies and procedures manual. The primary purpose of PWM's policies and procedures is to comply with the supervision requirements of the Investment Adviser's Act ("Act"). Mr. Rivero is supervised by PWM's President, Brett Power. Matthew Giggey, CCO, is primarily responsible for the implementation of the Firm's policies and procedures and overseeing the activities of the supervised persons and client accounts. Should a client have any questions regarding the Firm's supervision or compliance practices, please contact Matthew Giggey at 859-402-1462.

Item 1 – Cover Page



Matthew B. Lambert
Individual IARD# 5125462

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April 2024

This brochure supplement provides information about Mr. Lambert that supplements the PWM brochure. You should have received a copy of that brochure. Please contact Mr. Power if you did not receive PWM's brochure or if you have any questions about the contents of this supplement.

Additional information about Mr. Lambert is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 - Educational Background and Business Experience

Matthew B. Lambert, b. 1980

Education Background

University of Missouri – Columbia

Business Background

Firm	Position	Dates
Power Wealth Management LLC	Senior Wealth Advisor	04/2024 – Present
Fidelity Investments	Investment Consultant	06/2015 – 04/2024
Fidelity Personal	Mass Transfer	07/2018 – 04/2024
The Mutual Fund Store - Georgia	Vice President Investments	02/2015 – 05/2015
TD Ameritrade	Investment Consultant	08/2007 – 02/2015

Item 3 - Disciplinary Information

Investment Advisor Representatives are required to disclose all material facts regarding any legal and disciplinary events would be material to clients' and prospective clients' evaluation of the representative. Mr. Lambert has no information applicable to this Item.

Item 4 - Other Business Activities

Mr. Lambert is separately licensed as an independent insurance agent and spends as much as 10% of his time on these non-advisory activities. This poses a conflict to the extent that he has a financial incentive to recommend insurance products that result in commissions, trails or other payments. PWM is dedicated to acting in the clients' best interests based on fiduciary principles. Clients are under no obligation to purchase any recommended brokerage products or insurance products.

Item 5 - Additional Compensation

Mr. Lambert does not receive compensation for advisory services other than fees paid by the client.

Item 6 - Supervision

PWM provides investment advisory and supervisory services in accordance with the Firm's policies and procedures manual. The primary purpose of PWM's policies and procedures is to comply with the supervision requirements of the Investment Adviser's Act ("Act"). Mr. Lambert is supervised by PWM's President, Brett Power. Matthew Giggey, CCO, is primarily responsible for the implementation of the Firm's policies and procedures and overseeing the activities of the supervised persons and client accounts. Should a client have any questions regarding the Firm's supervision or compliance practices, please contact Matthew Giggey at 859-402-1462.