

Item 1 – Cover Page



**Brett A. Power**

Individual CRD# 5439950

Power Wealth Management LLC  
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(404) 889-8919

[www.powerwm.com](http://www.powerwm.com)

[www.powerwealthmanagement.com](http://www.powerwealthmanagement.com)

July 26, 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 us at (404) 889-8919 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](http://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**

Power Wealth Management LLC

Kestra Advisory Services, LLC

Kestra Investment Services, LLC

Strategic Advisers LLC

Fidelity Brokerage Services LLC

#### **Position**

President, Partner, Sr. Wealth Advisor

Investment Adviser Representative

Registered Representative

Investment Adviser Representative

Registered Representative

#### **Dates**

6/2020 – Present

5/2018 – 2/2020

5/2018 – 2/2020

10/2010 – 5/2018

10/2010 – 5/2018

## Item 3 - Disciplinary Information

Investment Advisor Representatives are required to disclose all material facts regarding any legal and disciplinary events that 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 a 50% owner of Power Protection Strategies, LLC ("PPS") through his wholly owned entity, Powerful Ventures, LLC. PPS is an independent licensed insurance agency. He is also separately licensed as an independent insurance agent and earns commissions and other compensation when recommending insurance products. Mr. Power spends as much as 10% of his time on these non-advisory activities. Additionally, he receives an indirect benefit of all insurance sales that are made through PPS due to the fact that owners share in the profits and losses of the agency. This remuneration poses a conflict in that Mr. Power 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 insurance products.

## Item 5 - Additional Compensation

Other than as stated above, Mr. Power does not have any compensation to disclose.

## **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 Advisers Act. Nicholas Coppola, 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 of Mr. Power or compliance practices, please contact Mr. Coppola at (404) 889-8919.

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**Ian J. Rivero**

Individual CRD# 5690690

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**This brochure supplement provides information about Mr. Rivero that supplements the PWM brochure. You should have received a copy of that brochure. Please contact us at (404) 889-8919 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](http://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

<b>Firm</b>	<b>Position</b>	<b>Dates</b>
Power Wealth Management LLC	Partner, Sr. Wealth Advisor	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 Adviser Representatives are required to disclose all material facts regarding any legal and disciplinary events that 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

Ian Rivero is a 50% owner of Power Protection Strategies ("PPS") through his wholly owned entity, Capital Ventures LLC. PPS is an independent licensed insurance agency. He is also separately licensed as an independent insurance agent and earns commissions and other compensation when recommending insurance products. Mr. Rivero spends as much as 10% of his time on these non-advisory activities. Additionally, he receives an indirect benefit of all insurance sales that are made through PPS due to the fact that owners share in the profits and losses of the agency. This remuneration poses a conflict in that Mr. Rivero 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 insurance products.

## Item 5 - Additional Compensation

Other than as stated above, Mr. Rivero does not have any other compensation to disclose.

## 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 Advisers Act. Nicholas Coppola, 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 of Mr. Rivero or compliance practices, please contact Mr. Coppola at (404) 889-8919.

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Matthew B. Lambert

Individual CRD# 5125462

Power Wealth Management LLC

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**Additional information about Mr. Lambert is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

## Item 2 - Educational Background and Business Experience

Matthew B. Lambert, b. 1980

### Education Background

University of Missouri-Columbia – BS, Finance and Financial Management

### Business Background

<b>Firm</b>	<b>Position</b>	<b>Dates</b>
Power Wealth Management LLC	Senior Wealth Advisor	04/2024 – Present
Fidelity Investments	Investment Consultant	06/2015 – 04/2024
Fidelity Personal	Vice President, Financial Adviser	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 that 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 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

Other than as stated above, Mr. Lambert does not have any other compensation to disclose.

## 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 Advisers Act. Nicholas Coppola, 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 of Mr. Lambert or compliance practices, please contact Mr. Coppola at (404) 889-8919.

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Nicholas A. Coppola

Individual CRD#4850142

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**Additional information about Mr. Coppola is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**



## Item 2 - Educational Background and Business Experience

Nicholas A. Coppola, b. 1983

### Education Background

University of Delaware – BS, Finance

Wake Forest University – MBA, Conc. Securities Analysis

Chartered Financial Analyst® (CFA®)

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.

### Business Background

#### **Firm**

Power Wealth Management LLC

Mercer Global Advisors

Kays Financial Advisory

Thompson Research Group

#### **Position**

CIO, CCO

Senior Portfolio Manager

Senior Portfolio Manager

Senior Equity Analyst

#### **Dates**

06/2023 – Present

12/2020 – 11/2022

01/2018 – 11/2020

06/2010 – 01/2018

## Item 3 - Disciplinary Information

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

## Item 4 - Other Business Activities

Mr. Coppola has no other business activities to report.

## Item 5 - Additional Compensation

Mr. Coppola does not have any additional compensation to disclose.

## 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 Advisers Act. Mr. Coppola is supervised by PWM's President, Brett Power. Should a client have any questions regarding the Firm's supervision of Mr. Coppola, please contact Mr. Power at (404) 889-8919.

Item 1 – Cover Page



Pamela M. Tate  
Individual CRD#7504099

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**Additional information about Ms. Tate is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

## Item 2 - Educational Background and Business Experience

Pamela M. Tate, b. 1966

### Education Background

Louisiana State University – BS, Electrical Engineering

University of Southern California – MS, Financial Engineering

### Business Background

<b>Firm</b>	<b>Position</b>	<b>Dates</b>
Power Wealth Management LLC	Portfolio Implementation Specialist	04/2024 – Present
T3 Trading Group, LLC	Proprietary Trader	02/2022 – 11/2023
Self Employed	Private Tutor, Consultant	03/2020 – 11/2023
Yoga Bliss	Instructor	11/2014 – 08/2019

## Item 3 - Disciplinary Information

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

## Item 4 - Other Business Activities

Ms. Tate does not have any other business activities to disclose.

## Item 5 - Additional Compensation

Ms. Tate does not have any other compensation to disclose.

## 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 Advisers Act. Nicholas Coppola, 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 of Ms. Tate or compliance practices, please contact Mr. Coppola at (404) 889-8919.