

*This brochure supplement provides information about Keith D. Weiss that supplements the Weiss Financial Group LLC brochure. You should have received a copy of that brochure. Please contact Keith D. Weiss, Managing Member if you did not receive Weiss Financial Group LLC's brochure or if you have any questions about the contents of this supplement.*

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

## **Weiss Financial Group LLC**

### **Form ADV Part 2B – Individual Disclosure Brochure**

*for*

### **Keith D. Weiss**

Personal CRD Number: 5280763

Investment Adviser Representative

Weiss Financial Group LLC  
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Mahopac, New York, 10541  
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## Item 2: Educational Background and Business Experience

**Name:** Keith D. Weiss      **Born:** 1978

### Education Background and Professional Designations:

#### Education:

BS Education, Springfield College - 2003  
MBA Accounting, University of Phoenix – 2005  
College for Financial Planning, Financial Planning Certificate - 2011

#### Business Background:

10/2011 – Present	Managing Member Weiss Financial Group LLC
11/2010 – Present	President Weiss Advisory Group LLC
01/2009 – 12/2011	Investment Adviser Representative Asset & Financial Planning, Ltd.
01/2009 – 12/2011	Registered Representative Prime Capital Services, Inc.
01/2008 – 10/2010	Manager Gilman Ciocia
01/2007 – 12/2007	Assistant Weiss Financial Services LLC
02/2004 – 12/2006	Account Manager Weiss Advisory Group LLC

### **Item 3: Disciplinary Information**

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

### **Item 4: Other Business Activities**

Keith D. Weiss is the President of the Weiss Advisory Group and an accountant. Weiss Financial Group LLC always acts in the best interest of the client. Clients are in no way required to implement the plan through any representative of Weiss Financial Group LLC in their capacity as an accountant.

### **Item 5: Additional Compensation**

Other than salary, annual bonuses, or regular bonuses, Keith D. Weiss does not receive any economic benefit from any person, company, or organization, in exchange for providing clients advisory services through Weiss Financial Group LLC.

### **Item 6: Supervision**

As a co-owner and representative of Weiss Financial Group LLC, Keith D. Weiss works closely with Scott G. Weiss and Richard F. Weiss, and all advice provided to clients is reviewed by either supervisor prior to implementation. Keith D. Weiss's contact information is on the cover page of this disclosure document.