

**Item 1: Cover Page**  
**Part 2B of Form ADV: Brochure Supplement**  
**April 2019**

**Donald M. Daniels**

**Daniels D'Amelio Investment Management Group, LLC**  
**155 North River Dr. East**  
**Jupiter, Florida 33458**  
**[www.DanielsDamelioIMG.com](http://www.DanielsDamelioIMG.com)**

**Firm Contact:**  
**Donald M. Daniels**  
**Chief Compliance Officer**

This brochure supplement provides information about Mr. Daniels that supplements our brochure. You should have received a copy of that brochure. Please contact Mr. Daniels if you did not receive Daniels D'Amelio Investment Management Group, LLC's brochure or if you have any questions about the contents of this supplement. Additional information about Mr. Daniels is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching CRD #832589.

## Item 2: Educational Background & Business Experience

**Donald M. Daniels**  
**Year of Birth:** 1950

### **Educational Background:**

- 1998: The Wharton School at the University of Pennsylvania; Securities Industry Association Leadership Institute for Branch Managers
- 1976: Nichols College; Bachelor of Arts in History with a Minor in Finance

### **Business Background:**

- 04/2019 – Present Daniels D'Amelio Investment Management Group, LLC; Managing Member, Chief Executive Officer, Chief Compliance Officer & Senior Portfolio Manager
- 08/2009 – 04/2019 Merrill Lynch, Pierce, Fenner & Smith, Inc.; Vice President & Portfolio Manager

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

- 10/2018: Securities Industry Essentials Exam (SIE)
- 12/1993: Series 65 Exam
- 04/1991: Series 8 Exam
- 04/1989: Series 63 Exam
- 10/1981: Series 5 Exam
- 09/1977: PC – AMEX Put and Call Exam
- 12/1976: Series 7 Exam

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

Mr. Daniels was involved in a customer dispute regarding the sale of a bond portfolio which was settled on 06/13/2011. For additional information please search CRD #832589 at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 4: Other Business Activities

Mr. Daniels is a licensed insurance agent/broker. 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

<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.

may create an incentive to recommend products based on the compensation earned. To mitigate this potential conflict, Mr. Daniels, as a fiduciary, will act in the client's best interest.

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

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

### **Item 6: Supervision**

Mr. Daniels is the sole owner and Chief Compliance Officer and as such has no internal supervision placed over him. He is, however, bound by our firm's Code of Ethics.

### **Item 7: Requirements for State-Registered Advisers**

Mr. Daniels has not been involved in any arbitration claim alleging damages in excess of \$2,500. Furthermore, he has neither been involved in nor found liable in any civil, self-regulatory organization, or administrative proceeding nor has been the subject of any bankruptcy petitions.