

This brochure supplement provides information about Oscar Montealegre that supplements the Montealegre Finanzas LLC brochure. You should have received a copy of that brochure. Please contact Oscar Montealegre, Managing Member if you did not receive Montealegre Finanzas LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Oscar Montealegre is also available on the SEC's website at www.adviserinfo.sec.gov.

Montealegre Finanzas LLC

Form ADV Part 2B – Individual Disclosure Brochure

for

Oscar Montealegre

Personal CRD Number: 5109351

Investment Adviser Representative

Montealegre Finanzas LLC
1225 W, 190th Street, Suite 275
Gardena, California, 90248
(310) 467-7199
oscarmonte80@hotmail.com

UPDATED: 1/15/2024

Item 2: Educational Background and Business Experience

Name: Oscar Montealegre **Born:** 1980

Education Background and Professional Designations:

Education:

BA Journalism, Long Beach State University – 2003
MA International Relations, University of Westminster – 2005
Certificate, International Trade & Commerce, UCLA Extensions – 06/29/2012

Business Background:

04/2012 – Present	Managing Member Montealegre Finanzas LLC
06/2010 – Present	Chief Financial Officer HM Carpet, Inc
11/2007 – 05/2010	Stockbroker Scottrade
09/2006 – 10/2007	Financial Advisor Independent Capital Management
09/2006 – 10/2007	Financial Representative AIG Financial Advisors

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

Oscar Montealegre is not engaged in any investment-related business or occupation (other than this advisory firm).

Item 5: Additional Compensation

Other than salary, annual bonuses, or regular bonuses, Oscar Montealegre does not receive any economic benefit from any person, company, or organization, in exchange for providing clients advisory services through Montealegre Finanzas LLC.

Item 6: Supervision

As the only owner and representative of Montealegre Finanzas LLC, Oscar Montealegre supervises all duties and activities of the firm. Oscar Montealegre's contact information is on the cover page of this disclosure document. Oscar Montealegre adheres to all required regulations regarding the activities of an Investment Adviser Representative and follows all policies and procedures outlined in the firm's policies and procedures manual, including the Code of Ethics, and appropriate securities regulatory requirements.

Item 7: Requirements For State Registered Advisers

This disclosure is required by California securities authorities and is provided for your use in evaluating this investment advisor representative's suitability.

- A. Oscar Montealegre has **NOT** been involved in any of the events listed below.
1. An award or otherwise being found liable in an arbitration claim alleging damages in excess of \$2,500, involving any of the following:
 - a) an investment or an investment-related business or activity;
 - b) fraud, false statement(s), or omissions;
 - c) theft, embezzlement, or other wrongful taking of property;
 - d) bribery, forgery, counterfeiting, or extortion; or
 - e) dishonest, unfair, or unethical practices.
 2. An award or otherwise being found liable in a civil, self-regulatory organization, or administrative proceeding involving any of the following:
 - a) an investment or an investment-related business or activity;
 - b) fraud, false statement(s), or omissions;
 - c) theft, embezzlement, or other wrongful taking of property;
 - d) bribery, forgery, counterfeiting, or extortion; or
 - e) dishonest, unfair, or unethical practices.
- B. Oscar Montealegre has **NOT** been the subject of a bankruptcy petition at any time.