

FORM ADV**Uniform Application for Investment Adviser Registration****Part II - Page 1****OMB APPROVAL**

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Hours per response.....9.402

Name of Investment Adviser:						
Address:	(Number and Street)	(City)	(State)	(Zip Code)	Area Code:	Telephone Number:

**This part of FORM ADV gives information about the investment adviser and its business for the use of clients.
The information has not been approved or verified by any government authority.**

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(Schedule A, B, C, D, and E are included with Part I of this Form, for the use of regulatory bodies, and are not distributed to clients.)

Potential persons who are to respond to the collection of information contained in this form
are not required to respond unless the form displays a currently valid OMB control number.

Applicant:

SEC File Number:

Date:

801-

1. A. Advisory Services and Fees. (check the applicable boxes)

For each type of service provided, state the approximate % of total advisory billings from that service. (See instruction below.)

Applicant:

- | | | |
|------------------------------|--|---------|
| <input type="checkbox"/> (1) | Provides investment supervisory services | _____ % |
| <input type="checkbox"/> (2) | Manages investment advisory accounts not involving investment supervisory services..... | _____ % |
| <input type="checkbox"/> (3) | Furnishes investment advice through consultations not included in either service described above... | _____ % |
| <input type="checkbox"/> (4) | Issues periodicals about securities by subscription | _____ % |
| <input type="checkbox"/> (5) | Issues special reports about securities not included in any service described above..... | _____ % |
| <input type="checkbox"/> (6) | Issues, not as part of any service described above, any charts, graphs, formulas, or other devices which clients may use to evaluate securities..... | _____ % |
| <input type="checkbox"/> (7) | On more than an occasional basis, furnishes advice to clients on matters not involving securities... | _____ % |
| <input type="checkbox"/> (8) | Provides a timing service | _____ % |
| <input type="checkbox"/> (9) | Furnishes advice about securities in any manner not described above..... | _____ % |

(Percentages should be based on applicant's last fiscal year. If applicant has not completed its first fiscal year, provide estimates of advisory billings for that year and state that the percentages are estimates.)

- | | | |
|--|------------------------------|-----------------------------|
| B. Does applicant call any of the services it checked above financial planning or some similar term? | Yes <input type="checkbox"/> | No <input type="checkbox"/> |
|--|------------------------------|-----------------------------|

C. Applicant offers investment advisory services for: (check all that apply)

- | | |
|---|--|
| <input type="checkbox"/> (1) A percentage of assets under management | <input type="checkbox"/> (4) Subscription fees |
| <input type="checkbox"/> (2) Hourly charges | <input type="checkbox"/> (5) Commissions |
| <input type="checkbox"/> (3) Fixed fees (not including subscription fees) | <input type="checkbox"/> (6) Other |

D. For each checked box in A above, describe on Schedule F:

- the services provided, including the name of any publication or report issued by the adviser on a subscription basis or for a fee
- applicant's basic fee schedule, how fees are charged and whether its fees are negotiable
- when compensation is payable, and if compensation is payable before service is provided, how a client may get a refund or may terminate an investment advisory contract before its expiration date

2. Types of clients - Applicant generally provides investment advice to: (check those that apply)

- | | |
|--|---|
| <input type="checkbox"/> A. Individuals | <input type="checkbox"/> E. Trusts, estates, or charitable organizations |
| <input type="checkbox"/> B. Banks or thrift institutions | <input type="checkbox"/> F. Corporations or business entities other than those listed above |
| <input type="checkbox"/> C. Investment companies | <input type="checkbox"/> G. Other (describe on Schedule F) |
| <input type="checkbox"/> D. Pension and profit sharing plans | |

Answer all items. Complete amended pages in full, circle amended items and file with execution page (page 1)

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Applicant:

SEC File Number:
801-

Date:

3. Types of Investments. Applicant offers advice on the following: (check those that apply)

- | | |
|---|---|
| <input type="checkbox"/> A. Equity securities | <input type="checkbox"/> H. United States government securities |
| <input type="checkbox"/> (1) exchange-listed securities | <input type="checkbox"/> I. Options contracts on: |
| <input type="checkbox"/> (2) securities traded over-the-counter | <input type="checkbox"/> (1) securities |
| <input type="checkbox"/> (3) Foreign issuers | <input type="checkbox"/> (2) commodities |
| <input type="checkbox"/> B. Warrants | <input type="checkbox"/> J. Futures contracts on: |
| <input type="checkbox"/> C. Corporate debt securities (other than commercial paper) | <input type="checkbox"/> (1) tangibles |
| <input type="checkbox"/> D. Commercial paper | <input type="checkbox"/> (2) intangibles |
| <input type="checkbox"/> E. Certificates of deposit | <input type="checkbox"/> K. Interests in partnerships investing in: |
| <input type="checkbox"/> F. Municipal securities | <input type="checkbox"/> (1) real estate |
| <input type="checkbox"/> G. Investment company securities: | <input type="checkbox"/> (2) oil and gas interests |
| <input type="checkbox"/> (1) variable life insurance | <input type="checkbox"/> (3) other (explain on Schedule F) |
| <input type="checkbox"/> (2) variable annuities | <input type="checkbox"/> L. Other (explain on Schedule F) |
| <input type="checkbox"/> (3) mutual fund shares | |

4. Methods of Analysis, Sources of Information, and Investment Strategies.

A. Applicant's security analysis methods include: (check those that apply)

- | | |
|--|--|
| (1) <input type="checkbox"/> Charting | (4) <input type="checkbox"/> Cyclical |
| (2) <input type="checkbox"/> Fundamental | (5) <input type="checkbox"/> Other (explain on Schedule F) |
| (3) <input type="checkbox"/> Technical | |

B. The main sources of information applicant uses include: (check those that apply)

- | | |
|--|---|
| (1) <input type="checkbox"/> Financial newspapers and magazines | (5) <input type="checkbox"/> Timing services |
| (2) <input type="checkbox"/> Inspections of corporate activities | (6) <input type="checkbox"/> Annual reports, prospectuses, filings with the |
| (3) <input type="checkbox"/> Research materials prepared by others | Securities and Exchange Commission |
| (4) <input type="checkbox"/> Corporate rating services | (7) <input type="checkbox"/> Company press releases |
| | (8) <input type="checkbox"/> Other (explain on Schedule F) |

C. The investment strategies used to implement any investment advice given to clients include: (check those that apply)

- | | |
|---|--|
| (1) <input type="checkbox"/> Long term purchases
(securities held at least a year) | (5) <input type="checkbox"/> Margin transactions |
| (2) <input type="checkbox"/> Short term purchases
(securities sold within a year) | (6) <input type="checkbox"/> Option writing, including covered options,
uncovered options or spreading strategies |
| (3) <input type="checkbox"/> Trading (securities sold within 30 days) | (7) <input type="checkbox"/> Other (explain on Schedule F) |
| (4) <input type="checkbox"/> Short sales | |

Answer all items. Complete amended pages in full, circle amended items and file with execution page (page 1)

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Part II - Page 4

Applicant:

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Date:

5. Education and Business Standards.

Are there any general standards of education or business experience that applicant requires of those involved in determining or giving investment advice to clients? Yes No
☐ ☐

(If yes, please describe these standards on Schedule F)

6. Education and Business Background.

For:

- each member of the investment committee or group that determines general investment advice to be given to clients, or
- if the applicant has no investment committee or group, each individual who determines general investment advice clients (if more than five, respond only for their supervisors)
- each principal executive officer of applicant or each person with similar status or performing similar functions.

On Schedule F, give the:

- name
- year of birth
- formal education after high school
- business background for the preceding five years

7. Other Business Activities. (check those that apply)

- ☐ A. Applicant is actively engaged in a business other than giving investment advice.
- ☐ B. Applicant sells products or services other than investment advice to clients.
- ☐ C. The principal business of applicant or its principal executive officers involves something other than providing investment advice.

(For each checked box describe the other activities, including the time spent on them, on Schedule F.)

8. Other Financial Industry Activities or Affiliations. (check those that apply)

- ☐ A. Applicant is registered (or has an application pending) as a securities broker-dealer.
- ☐ B. Applicant is registered (or has an application pending) as a futures commission merchant, commodity pool operator or commodity trading adviser.
- ☐ C. Applicant has arrangements that are material to its advisory business or its clients with a related person who is a:
- | | |
|--|--|
| <input type="checkbox"/> (1) broker-dealer | <input type="checkbox"/> (7) accounting firm |
| <input type="checkbox"/> (2) investment company | <input type="checkbox"/> (8) law firm |
| <input type="checkbox"/> (3) other investment adviser | <input type="checkbox"/> (9) insurance company or agency |
| <input type="checkbox"/> (4) financial planning firm | <input type="checkbox"/> (10) pension consultant |
| <input type="checkbox"/> (5) commodity pool operator, commodity trading adviser or futures commission merchant | <input type="checkbox"/> (11) real estate broker or dealer |
| <input type="checkbox"/> (6) banking or thrift institution | <input type="checkbox"/> (12) entity that creates or packages limited partnerships |

(For each checked box in C, on Schedule F identify the related person and describe the relationship and the arrangements.)

- D. Is applicant or a related person a general partner in any partnership in which clients are solicited to invest?.. Yes No
☐ ☐

(If yes, describe on Schedule F the partnerships and what they invest in.)

Answer all items. Complete amended pages in full, circle amended items and file with execution page (page 1)

Applicant:

SEC File Number:
801-

Date:

9. Participation or Interest in Client Transactions.

Applicant or a related person: (check those that apply)

- ☐ A. As principal, buys securities for itself from or sells securities it owns to any client.
- ☐ B. As broker or agent effects securities transactions for compensation for any client.
- ☐ C. As broker or agent for any person other than a client effects transactions in which client securities are sold to or bought from a brokerage customer.
- ☐ D. Recommends to clients that they buy or sell securities or investment products in which the applicant or a related person has some financial interest.
- ☐ E. Buys or sell for itself securities it also recommended to clients.

(For each box checked, describe on Schedule F when the applicant or a related person engages in these transactions and what restrictions, internal procedures, or disclosures are used for conflicts of interest in those transactions.)

Describe, on Schedule F, your code of ethics, and state that you will provide a copy of your code of ethics to any client or prospective client upon request.

- 10. Conditions for Managing Accounts.** Does the applicant provide investment advisory services, manage investment advisory accounts or hold itself out as providing financial planning or some similarly termed services *and* impose a minimum dollar value of assets or other condition for starting or maintaining an account?

Yes No
☐ ☐

(If yes, describe on Schedule F)

- 11. Review of Accounts.** If applicant provides investment supervisory services, manages investment advisory account, or holds itself out as providing financial planning or some similarly termed services:

- A. Describe below the reviews and reviewers of the accounts. **For reviews**, include their frequency, different levels, and triggering factors. **For reviewers**, include the number of reviewers, their titles and functions, instructions they receive from applicant on performing reviews, and number of accounts assigned each.
- B. Describe below the nature and frequency of regular reports to clients on their accounts.

Applicant:

SEC File Number:
801-

Date:

12. Investment or Brokerage Discretion.

A. Does applicant or any related person have authority to determine, without obtaining specific client consent, the:

- | | | |
|--|--------------------------|--------------------------|
| | Yes | No |
| (1) securities to be bought or sold? | <input type="checkbox"/> | <input type="checkbox"/> |
| (2) amount of securities to be bought or sold? | <input type="checkbox"/> | <input type="checkbox"/> |
| (3) broker or dealer to be used? | <input type="checkbox"/> | <input type="checkbox"/> |
| (4) commission rates paid? | <input type="checkbox"/> | <input type="checkbox"/> |

B. Does applicant or a related person suggest brokers to clients? ☐ Yes ☐ No

For each yes answer to A describe on Schedule F any limitations on the authority. For each yes to A(3), A(4) or B, describe on Schedule F the factors considered in selecting brokers and determining the reasonableness of their commissions. If the value of products, research and services given to the applicant or a related person is a factor, describe:

- the products, research and services
- whether clients may pay commissions higher than those obtainable from other brokers in return for those products and services
- whether research is used to service all of applicant's accounts or just those accounts paying for it; and
- any procedures the applicant used during the last fiscal year to direct client transactions to a particular broker in return for product and research services received.

13. Additional Compensation.

Does the applicant or a related person have any arrangements, oral or in writing, where it:

- | | | |
|---|--------------------------|--------------------------|
| A. is paid cash by or receives some economic benefit (including commissions, equipment or non-research services) from a non-client in connection with giving advice to clients? | Yes | No |
| | <input type="checkbox"/> | <input type="checkbox"/> |
| B. directly or indirectly compensates any person for client referrals? | Yes | No |
| | <input type="checkbox"/> | <input type="checkbox"/> |

(For each yes, describe the arrangements on Schedule F.)

14. Balance Sheet. Applicant must provide a balance sheet for the most recent fiscal year on Schedule G if applicant:

- has custody of client funds or securities (unless applicant is registered or registering only with the Securities and Exchange Commission); or
- requires prepayment of more than \$500 in fees per client and 6 or more months in advance

Has applicant provided a Schedule G balance sheet?..... ☐ Yes ☐ No

**Schedule F of
Form ADV
Continuation Sheet for Form ADV Part II**

Applicant
Presidential Brokerage, Inc

SEC File Number:
801- 66495

Date:
3/10/2009

(Do not use this Schedule as a continuation sheet for Form ADV Part I or any other schedules.)

1. Full name of applicant exactly as stated in Item 1A of Form ADV: **Presidential Brokerage, Inc.**

IRS Empl. Ident. No.:
33-0469265

Item of Form (Identify)	Answer
Item 1.A	<p style="text-align: center;">Description of Services Offered</p> <p>Presidential Brokerage, Inc ("PBI"), through its advisory representatives offers a variety of investment advisory products and services as described below. PBI offers several wrap programs made available to PBI and its clients by PBI's clearing firm First Clearing, LLC ("FCC") and Wachovia Securities, LLC ("WSLLC"). FCC is a non-bank affiliate of WSLLC and also provides custodial and execution services for accounts participating in the wrap programs it makes available to PBI and its clients.</p> <p>PBI also provides two proprietary money management programs: Presidential's Dynamic 401(k) program, a discretionary asset allocation program designed to assist clients in allocating fund choices within their 401k plans; and DAAS, a discretionary mutual fund timing strategy managed by Matthew Pavich.</p> <p>Wrap Programs available through FCC/WSLLC</p> <p>The programs available from PBI through FCC and WSLLC include: Assets Advisor, FundSource, Custom Choice, Diversified Managed Allocations ("DMA"), Masters Investment Consulting ("Masters"), Network Investment Consulting ("Network"), and Wachovia Compass Advisory ("Compass"). Clients participating in any of these programs will be provided with separate disclosure documents, or "brochures", that are specific to the individual program. Clients should carefully review these brochures and program contracts for additional information about a specific program before selecting one.</p> <p>The standard advisory agreements for FundsSource, Masters, DMA and Compass includes language that grants PBI discretionary authority to change managers or funds. However, PBI does not utilize this discretionary authority except when granted under a separate written authorization.</p> <p>Asset Advisor</p> <p>Asset Advisor is a non-discretionary advisory program that includes advisory services and custodial/transaction costs in a single asset-based fee. Clients have the ability to invest in a variety of different investment products including stocks, bonds, mutual funds and options. Under this program clients may make their own investment decisions and conduct transactions on an unsolicited basis or work with their PBI advisory representative to help them decide which investments may be best suited for their situation. Investment recommendations made by an advisory representative are generally based on a variety of factors including, but not limited to, the client's investment goals and objectives, risk tolerance, time frame for investing and liquidity needs. For more information on this program and more detailed disclosures please refer to the Asset Advisor disclosure document.</p> <p>FundSource</p> <p>FundSource is a discretionary mutual fund wrap program providing clients with access to over 25 Optimal Blend fund portfolios actively managed by the Manager Strategy Group at WSLLC. The portfolios are constructed of load-waived, no-load and institutional share class mutual funds. Clients, along with their PBI advisory representative, can also create a tailored allocation for the client's specific needs using these mutual funds in Customized Blends within FundSource. While Customized Blends are built by advisory representatives and clients, the funds are also monitored by FCC's Manager Strategy Group. Both Optimal and Customized Blends offer automatic fund replacement as well as auto-rebalancing. For more information on this program and more detailed disclosures please refer to the FundSource disclosure document.</p>

Complete amended pages in full, circle amended items and file with execution page (page 1).

**Schedule F of
Form ADV
Continuation Sheet for Form ADV Part II**

Applicant
Presidential Brokerage, Inc

SEC File Number:
801- 66495

Date:
3/10/2009

(Do not use this Schedule as a continuation sheet for Form ADV Part I or any other schedules.)

1. Full name of applicant exactly as stated in Item 1A of Form ADV: **Presidential Brokerage, Inc.**

IRS Empl. Ident. No.:
33-0469265

Item of Form (Identify)	Answer
Item 1.A (cont.)	<p>Custom Choice Custom Choice is a non-discretionary mutual fund wrap program that allows a client and their PBI advisory representative to construct their own asset allocation from a broad universe of over 3600 institutional share class, no-load and load-waived mutual funds. This program helps clients maintain their strategic asset allocation by offering optional auto-rebalancing. For more information on this program and more detailed disclosures please refer to the Custom Choice disclosure document.</p> <p>DMA DMA is a discretionary advisory program that offers separately managed portfolios featuring asset allocation, diversification and risk-based portfolio management to investors. WSLLC's Manager Strategy Group evaluates a broad range of asset classes and investment styles and identifies classes or styles that perform differently under varying market conditions. From these, the Manager Strategy Group uses quantitative and qualitative measures to select what it perceives to be "best of breed" investment managers for the DMA program. Focusing both on the merits of the individual investment managers and on how the various investment managers on advisory roster complement one another, PBI has developed what it believes to be a continuum of diversified strategies for investors, based on specific risk tolerances and financial situations, called Optimal Blends. Clients can select one of the Optimal Blends or, working with their advisory representative, construct their own strategy using the DMA roster of investment managers. For more information on this program and more detailed disclosures please refer to the DMA disclosure document.</p> <p>Masters Masters is a discretionary advisory program designed to assist PBI advisory representatives and clients in identifying professional investment managers who can not only help a client meet their specific investment goals, but also keep their tolerance for risk in mind. A Masters client has access to any one of 70 of the nation's top professional institutional investment managers at pre-negotiated entry levels and fee schedules. For more information on this program and more detailed disclosures please refer to the Masters disclosure document.</p> <p>Network The mission of the Network program is to assist clients in identifying professional money managers who can meet the specific investment goals, risk tolerance and objectives of each client. Each Network portfolio is a professionally managed on a discretionary basis, separate account (individual stock and bond holdings) where the client pays PBI either a fee-in-lieu of commission or commission (on a negotiated commission rate) that covers a package of services: transaction charges, consulting services, and compensation to PBI for the value-added service that they provide the client. Keep in mind that fee-based accounts are not designed for either excessively traded or inactive accounts and may not be suitable for all investors. During periods of lower trading activity, fees may be lower in this program if the investor selects to open a commission-based account. For more information on this program and more detailed disclosures please refer to the Network disclosure document.</p> <p>Compass Wachovia Compass Advisory Program is a unique equity selection and monitoring service managed by a WSLLC team of professional portfolio strategists. The program is a discretionary separately managed account wrap program that includes two "individual" strategies, six "asset allocation" strategies and four "ETF Advantage" strategies. Assets are allocated into one of the model portfolios according to a client's Investment Policy Statement, as provided by the account opening questionnaire. Once invested,</p>
Complete amended pages in full, circle amended items and file with execution page (page 1).	

**Schedule F of
Form ADV
Continuation Sheet for Form ADV Part II**

Applicant
Presidential Brokerage, Inc

SEC File Number:
801- 66495

Date:
3/10/2009

(Do not use this Schedule as a continuation sheet for Form ADV Part I or any other schedules.)

1. Full name of applicant exactly as stated in Item 1A of Form ADV: **Presidential Brokerage, Inc.**

IRS Empl. Ident. No.:
33-0469265

Item of Form (Identify)	Answer																																																																													
Item 1.A (cont.)	<p>portfolios are managed on a discretionary basis with automatic re-balancing done by the portfolio manager.</p> <p>Program Fees - Unless otherwise noted all fees for wrap programs offered through FCC and the money management services provided by PBI are annual asset-based fees, charged quarterly, in advance. Fees are negotiable, and in the event that a client terminates a program prior to the end of a quarter then fees will be refunded on a pro-rated basis.</p> <p>The table below shows the standard fees for the wrap programs offered by PBI through FCC and WSLLC which may be negotiable between PBI and the client. The fees are based on the account value at the beginning of the billing period with the exception of Asset Advisor and Custom Choice accounts which may hold "non-billable" assets in the accounts which are not included for fee billing purposes.</p> <table border="1"> <thead> <tr> <th>Program</th><th colspan="2">First \$250,000</th><th colspan="2">Next \$750,000</th><th colspan="2">Over \$1 million</th></tr> <tr> <th></th><th>Quarterly fee</th><th>Annual fee</th><th>Quarterly fee</th><th>Annual fee</th><th>Quarterly fee</th><th>Annual fee</th></tr> </thead> <tbody> <tr> <td>Asset Advisor</td><td>0.75%</td><td>3.0%</td><td>0.625%</td><td>2.5%</td><td>0.5%</td><td>2.0%</td></tr> <tr> <td>FundSource</td><td>0.4375%</td><td>1.75%</td><td>0.375%</td><td>1.5%</td><td>0.2875%</td><td>1.15%</td></tr> <tr> <td>Custom Choice</td><td>0.4375%</td><td>1.75%</td><td>0.375%</td><td>1.5%</td><td>0.2875%</td><td>1.15%</td></tr> <tr> <td>DMA</td><td>0.75%</td><td>3.0%</td><td>0.625%</td><td>2.5%</td><td>0.5%</td><td>2.0%</td></tr> <tr> <td>Masters – Equity and Balanced Accounts</td><td>0.75%</td><td>3.0%</td><td>0.625%</td><td>2.5%</td><td>0.5%</td><td>2.0%</td></tr> <tr> <td>Masters - Fixed Accounts</td><td>0.4375%</td><td>1.75%</td><td>0.3125%</td><td>1.25%</td><td>0.25%</td><td>1.0%</td></tr> <tr> <td>Network – Equity and Balanced Accounts</td><td>0.5%</td><td>2.0%</td><td>0.375%</td><td>1.5%</td><td>0.25%</td><td>1.0%</td></tr> <tr> <td>Network - Fixed Accounts</td><td>0.25%</td><td>1.0%</td><td>0.1875%</td><td>0.75%</td><td>0.125%</td><td>0.5%</td></tr> <tr> <td>Compass</td><td>0.625%</td><td>2.5%</td><td>0.5%</td><td>2.0%</td><td>0.375%</td><td>1.5%</td></tr> </tbody> </table> <p>Program Termination – Program services described above may be terminated upon 10 days advance notice. Upon written receipt of notice to terminate its Client Agreement with any of PBI's investment advisory programs, and unless specific transfer instructions are received, PBI and its agent will, in an orderly and efficient manner, proceed with liquidation of the Client's account. There will not be a charge by PBI for such redemptions. However, the Client should be aware that certain mutual funds impose redemption fees as stated in each company's fund prospectus in certain circumstances. Clients must keep in mind that the decision to liquidate security issues or mutual funds may result in tax consequences that should be discussed with the client's tax advisor.</p> <p>Factors that may affect the orderly and efficient manner would be size and types of issues, liquidity of the markets, and market makers' abilities. Should the necessary securities' markets be unavailable and</p>	Program	First \$250,000		Next \$750,000		Over \$1 million			Quarterly fee	Annual fee	Quarterly fee	Annual fee	Quarterly fee	Annual fee	Asset Advisor	0.75%	3.0%	0.625%	2.5%	0.5%	2.0%	FundSource	0.4375%	1.75%	0.375%	1.5%	0.2875%	1.15%	Custom Choice	0.4375%	1.75%	0.375%	1.5%	0.2875%	1.15%	DMA	0.75%	3.0%	0.625%	2.5%	0.5%	2.0%	Masters – Equity and Balanced Accounts	0.75%	3.0%	0.625%	2.5%	0.5%	2.0%	Masters - Fixed Accounts	0.4375%	1.75%	0.3125%	1.25%	0.25%	1.0%	Network – Equity and Balanced Accounts	0.5%	2.0%	0.375%	1.5%	0.25%	1.0%	Network - Fixed Accounts	0.25%	1.0%	0.1875%	0.75%	0.125%	0.5%	Compass	0.625%	2.5%	0.5%	2.0%	0.375%	1.5%
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Complete amended pages in full, circle amended items and file with execution page (page 1).

**Schedule F of
Form ADV
Continuation Sheet for Form ADV Part II**

Applicant Presidential Brokerage, Inc	SEC File Number: 801- 66495	Date: 3/10/2009
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(Do not use this Schedule as a continuation sheet for Form ADV Part I or any other schedules.)

1. Full name of applicant exactly as stated in Item 1A of Form ADV: Presidential Brokerage, Inc.	IRS Empl. Ident. No.: 33-0469265
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Item of Form (Identify)	Answer
Item 1.A (cont.)	<p>unavailable and trading suspended, efforts to trade will be done as soon as possible following their reopening. Due to the administrative processing time needed to terminate Client's investment advisory service and communicate the instructions to Client's investment advisor, termination orders received from clients are not market orders; it may take several business days under normal market conditions to process Client's request. During this time, Client's account is subject to market risk. PBI and its agent are not responsible</p> <p>for market fluctuations of the Client's Account from time of written notice until complete liquidation, although efforts will be made to process the termination in an efficient and timely manner.</p> <p>Proprietary Money Management Services</p> <p>Presidential's Dynamic 401(k)SM Presidential's Dynamic 401(k) program is a discretionary investment advisory service tailored specifically for an individual ("Client") participating in 401(k) and/or other retirement plans ("Plan") where the investment options include a limited universe of funds or sub-accounts to choose from. The Dynamic program involves PBI's proprietary screening methodology that incorporates a macro assessment of the market and is then further customized to the Client's individual retirement program, specifically the investment options offered within the Plan. Implementation: When a Client's participation begins, her/his plan will be assigned a day of the month (along with other clients) on which reports will be run and allocations made (within the same two (2) business day period) each month. On the assigned day, PBI runs a series of Reports first using certain asset class benchmarks ("Macro Allocation") and then a Short Term Relative Strength Report specific to the mutual funds available in the Plan ("Custom Allocation"). The Custom Allocation Report assesses recent price performance information regarding the Plan's funds—using multiple weeks' end-of-day data – placing greater weight on the most recent tendencies toward strengths or weaknesses.</p> <p>The multi-layered allocation process begins with a review and comparison of three asset classes (the Macro Allocation): Money Market funds to Bonds, Bonds to Equities, and Equities to Money Market funds. An algorithm then determines the Macro Allocation, depending on the performance of each asset class relative to the other asset classes, and what percentage of the portfolio will be invested in money market (if any), what percentage will be invested in bonds (if any), and what percentage will be invested in the Custom allocation (if any). The Custom allocation involves choosing the top two funds based on the most recent positive relative strength performance. In the absence of any "positive" funds being identified through the report, money market will be the fund chosen and the effective default position.</p> <p>The determination of how much might be invested in each asset class depends on the current relative strength of the classes relative to the others. The Custom Allocation (within the Macro Allocation) will only invest in funds demonstrating current positive relative strength. Prolonged periods of rising equity markets may result in all, or nearly all, of the portfolio being invested in equities, while prolonged periods of declining equity markets may result in all, or nearly all, of the portfolio being invested in Money Market funds and/or Bonds. It is anticipated that an average monthly Macro Allocation will fall somewhere in between those extremes, but the Custom Allocation could change on a monthly basis with along with changing market conditions.</p>

Complete amended pages in full, circle amended items and file with execution page (page 1).

**Schedule F of
Form ADV
Continuation Sheet for Form ADV Part II**

Applicant
Presidential Brokerage, Inc

SEC File Number:
801- 66495

Date:
3/10/2009

(Do not use this Schedule as a continuation sheet for Form ADV Part I or any other schedules.)

1. Full name of applicant exactly as stated in Item 1A of Form ADV: **Presidential Brokerage, Inc.**

IRS Empl. Ident. No.:
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Item of Form (Identify)	Answer
Item 1.A (cont.)	<p>All aspects of the allocation's methodology are subject to modification based on changing market and economic environments.</p> <p>Risks associated with the program This is an aggressive strategy. The theory is clear that the intention is to keep the Client's assets invested in the best performing funds at all times. There are big differences between the quality and number of funds in any given Plan, however, and even optimal allocation of holdings may produce less than anticipated results. Because the information used to establish positions in the Plan utilizes historic data – even though it is weighted to reflect the most recent changes – there is no assurance that the strategy can avoid rapid downturns which could result in loss or participate in rapid market upswings resulting in loss of opportunity. The system is designed to identify and participate in market trends, but in “choppy” markets could be susceptible to whipsaws.</p> <p>Initial allocations will only occur on scheduled allocation days. Therefore, there may be a lag time of several days between the date this agreement is executed and the initial allocation by PBI. The client, if invested in funds other than money market, may be at risk in a volatile market. Conversely, 100% allocation to money market may result in lost opportunity in a rising market.</p> <p>It is important that Clients realize that the “custom” nature of this strategy refers to the unique universe of investment choices within their plan. The strategy does NOT take into consideration specific differences in risk tolerance or investment objectives.</p> <p>Trade Execution Both the Macro and Custom reports are generated on days allocation decisions are made, and rebalancing (or in the case of new Clients the initial allocation) will occur based on the results of that day's reports. Clients will provide PBI with the necessary information and authority to execute trades on the client's behalf as part of the program. PBI will email to Clients the results of both the Macro Allocation and their Custom Allocation reports following implementation. It is the responsibility of the Client to review reports and verify that the information on the Reports is what is held in the Account.</p> <p>Fees and termination The standard fee charged for setup, implementation, and ongoing guidance for the Dynamic 401(k) program is 1% annually, or \$150 per quarter, whichever is greater. A fee of 25 basis points (0.25%) of the total value of the Client's Plan at the beginning of each quarter will be charged to the Client (or the \$150 minimum). This fee is negotiable, either higher or lower, depending on the value of the Plan. The fee is the only charge by Presidential; however, additional costs incurred at the Plan such as mutual fund fees, including sub-account management fees and, in some cases, CDSC fees could be encountered. Either the client or PBI may terminate the agreement at any time and for any reason upon written notice to the other. In the event the agreement is terminated prior to the end of a calendar quarter the client will be refunded fees paid in advance on a pro-rata basis.</p>

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Item of Form (Identify)	Answer
Item 1.A (cont.)	<p>DAAS- Dynamic Asset Allocation Strategies</p> <p>The Dynamic asset allocation strategy ("DAAS") is a discretionary mutual fund timing approach developed and managed by Matthew Pavich ("Pavich"), an Investment Adviser Representative employed by PBI. DAAS involves the active trading of Sector funds, Index funds and, on occasion, leveraged versions of these funds offered by Rydex and ProFunds. The program is available through accounts held at Rydex Funds, ProFunds, and Nationwide Financial as more fully described in the section titled "Available Investment Platforms."</p> <p>DAAS is a highly active strategy that involves frequent transactions and may involve limited diversification. The Strategy may include the use of leveraged funds. By their nature leveraged funds are more risky as their volatility (by design) is greater than that of the base index or sector. For accounts held at Rydex, Pavich may also take advantage of "early trading" whereby individual funds may be traded mid-day.</p> <p>The DAAS program is available in a moderate, aggressive or speculative portfolio. These risk classifications are relative to the highly active nature of the trading activity involved. All clients complete a "Client Profile" that may assist in choosing the most appropriate portfolio.</p> <p>Available Investment Platforms</p> <p>Clients have the option of establishing their accounts at either Rydex Funds or Nationwide Financial in a MarketFlex Variable Annuity for the moderate and aggressive portfolios. Because of the high frequency of transactions, some trades in non-retirement accounts may result in a tax-wash sale. Therefore, Pavich recommends that Clients utilize a Rydex account for Retirement accounts and Nationwide for non-retirement accounts. ProFunds speculative portfolio is only recommended for that portion of a client's assets appropriate for high risk. Costs associated with Nationwide accounts may be as much as 0.75% higher than with a comparable Rydex account but may benefit from other features such as tax deferral treatment of potential gains in the account. Investors should consider all the relevant factors including, but not limited to, the following when determining the most appropriate platform:</p> <p><u>Nationwide Accounts – Moderate and Aggressive Portfolios</u></p> <ul style="list-style-type: none"> • Gains [when withdrawn] are taxed as ordinary income for non-retirement accounts. • Distributions from an annuity may be subject to penalties for withdrawals prior to age 59 ½ . • Payment of management fees from non-retirement accounts is a reportable event and will generate a 1099R. Clients should consult with their tax professional to determine potential tax deductibility of management fees. • The Mortality and Administration fees ("M&A") for the advisor class annuity is 0.45% per year. The underlying sub-account expense ratios are approximately 25-30 basis points higher than the comparable Investor class shares at Rydex, but approximately the same as the comparable H class shares at Rydex. • There are no surrender charges for liquidating an advisor class annuity at Nationwide. <p><u>Rydex Accounts – Moderate and Aggressive Portfolios</u></p> <ul style="list-style-type: none"> • For non-retirement accounts, capital gains are taxed at the short-term capital gain rate; losses may be subject to wash sale restrictions. • Payment of management fees from Rydex retirement accounts is not a reportable event and will not generate a 1099R.
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Item of Form (Identify)	Answer
Item 1.A (cont.)	<ul style="list-style-type: none"> The "Investor" share class is not available for all funds at Rydex including those that may be used in implementing the DAA strategy. In those cases the H class will be utilized with PBI forgoing the 12b-1 compensation. <p>ProFunds Accounts – Speculative Portfolio</p> <ul style="list-style-type: none"> For non-retirement accounts, capital gains are taxed at the short-term capital gain rate; losses may be subject to wash sale restrictions. Payment of management fees from ProFunds retirement accounts is not a reportable event and will not generate a 1099R. <p>Under all platforms, the Clients' accounts are managed on a "Separately Managed Account" basis, with the Client's assets being segregated from other client's accounts. Accounts are traded under a group number whereby all accounts are allocated identically based on the allocation specified by Pavich. The allocations may vary slightly between portfolios managed at Nationwide and those managed at Rydex. While the allocations will be essentially the same, result may vary due to different underlying program costs.</p> <p>Risks Associated With Sole Manager</p> <p>Pavich is the sole person responsible for managing assets under the DAAS program. If, for any reason Pavich become unavailable or is otherwise unable to perform his duties in managing the DAAS program there are no other persons that would be able to replace Pavich as manager. Under such circumstances, PBI would make arrangements for clients assets to be moved to Money Market funds, and the clients would be notified of the termination of the program with fees refunded on a pro-rated basis.</p> <p>Fees and Termination</p> <p>The standard fee charged for the DAAS program is 2% annually, which is paid in the following manner: An amount equal to 50 basis points (0.5%) of the total value of the Client's Account at the beginning of each quarter will be charged to the Client. These fees are negotiable depending on the value of the Account and other circumstances. Execution of the agreement intra-quarter will result in pro-rata billing based on the value of the Account on the date the Agreement is executed and the number of days remaining in the quarter. In the event the Agreement is cancelled, the fee paid by Client is refunded on a prorated basis based on the effective date of such cancellation. Additions/withdrawals greater than 10% of the period's beginning balance will trigger an additional charge/refund on a pro-rata basis to be included in the subsequent billing cycle.</p> <p>Management fees are independent of and in addition to other normal costs and fees associated with the Account including, but not limited to, sub-account management fees, custodial or other IRA fees and, for accounts held at Nationwide, Mortality and Administration charges.</p> <p>Either the client or PBI may terminate the DAAS program agreement at any time and for any reason upon written notice to the other. In the event the agreement is terminated prior to the end of a calendar quarter the client will be refunded fees paid in advance on a pro-rata basis.</p>

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Item of Form (Identify)	Answer
Item 1.A (cont.)	<p>Other Advisory Services</p> <p>Personal Financial Planning Services for Fee</p> <p>PBI provides personal financial planning services for a fee in the form of a financial plan encompassing such areas as Estate Planning, Retirement Planning, Investment Planning, and Business Succession planning. Such Plan is prepared from information provided by the client to PBI relating to a client's current financial picture, personal preferences relating to basic elements such as risk tolerance, and long-term financial objectives. PBI and the client work as a team putting together the information necessary to create a Plan. The quality and value of the completed Plan is dependent upon accurate information.</p> <p>The cost of Plan preparation is dependent upon the extent and complexity of the Plan. Typical plans prepared by PBI cost between \$500 and \$2,000; the cost and extent of a Plan is negotiated and agreed upon prior to development of the Plan. These costs are separate from and do not include any costs associated with the implementation of any Financial Plan, whether executed through PBI or elsewhere.</p>
Item 5	<p>Education and Business Standards</p> <p>PBI requires persons associated with the advisory services referred to in this disclosure document (other than persons whose functions are solely clerical or administrative) to have appropriate industry experience, judgment, and ethics plus the required industry exams, licensing, and registrations, if any.</p>
Item 6	<p>Education and Business background</p> <p>The educational and recent business backgrounds of key officers of Presidential and individuals involved with the Programs are as follows:</p> <p>Daniel G. Lempe—President</p> <ul style="list-style-type: none"> ■ YOB: 1957 ■ Education: University of Minnesota/Duluth; four years ■ Business background (most recent five years): Presidential Brokerage, Inc; June 1991 to present <p>John A. DuPriest—CEO</p> <ul style="list-style-type: none"> ■ YOB: 1945 ■ Education: University of Denver; B.A., Social Sciences/Education ■ Business background (most recent five years): Presidential Brokerage, Inc; January 1998 to present <p>Michael W. Speer—Executive Vice President</p> <ul style="list-style-type: none"> ■ YOB: 1952 ■ Education: DeKalb Senior High ■ Business background (most recent five years): Presidential Brokerage, Inc; April 1996 to present

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Item of Form (Identify)	Answer
Item 5 (cont.)	<p>Anthony J. Campen—Chief Compliance Officer</p> <ul style="list-style-type: none"> ■ YOB: 1961 ■ Education: California State University/Chico; B.S., Business Administration ■ Business background (most recent five years): Presidential Brokerage, Inc; August 1995 to present <p>Matthew Pavich</p> <ul style="list-style-type: none"> ■ YOB: 1957 ■ Education: San Diego State University, B.S., Marketing ■ Business background (most recent five years): Presidential Brokerage, Inc., January 2004 to present
Item 7	<p>Other Business Activities</p> <p>PBI is a FINRA registered broker/dealer and a licensed Insurance agency. All of PBI's advisory representatives are registered representatives of PBI and may earn sales commissions when effecting securities transactions for clients in that capacity. Most of PBI's advisory representatives are also licensed insurance agents that generate commissions through the sale of insurance products. Commissions generated by both the brokerage and the insurance products may involve clients that are also clients of the PBI in its capacity as an advisor, thereby resulting in a conflict of interest when these products are offered and sold to clients.</p>
Items 9.B,D,E	<p>Participation or Interest in Client Transactions</p> <p>When an advisory representative effects securities transactions for clients (in PBI's capacity as a broker-dealer) they may earn sales commissions. Clients may choose whether or not to execute their securities transactions with PBI as a broker-dealer or with another broker-dealer. The managed accounts offered by WSLLC and custodied by FCC do require clients to utilize PBI's broker-dealer. The clients may not choose another broker-dealer when participating in these programs.</p> <p>On occasion, an advisory representative or PBI, for its own proprietary account, will make the purchase and sale of securities for their own accounts that are also recommended to its clients. PBI has a fiduciary duty to its advisory clients and will always give client trades priority over trades executed for PBI or and/or affiliated persons.</p> <p>PBI has adopted a Code of Ethics which states that high ethical standards are essential for the success of PBI and to maintain the confidence of clients and clients serviced by its advisory representatives. PBI's long-term business interests are best served by adherence to the principle that the interests of clients come first. PBI has a duty to act solely for the benefit its clients. Potential conflicts of interest may arise in connection with the personal trading activities of our personnel. Accordingly, PBI has adopted this Code of Ethics containing provisions designed to (1) prevent improper personal trading; (2) identify conflicts of interest; and (3) provide a means to address any actual or potential conflict of interest. Adherence to the Code of Ethics and the related restrictions on personal investing is considered a basic condition of employment by PBI. Clients or potential clients may receive a copy of this Code of Ethics by contacting PBI at 800-230-1288.</p>
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Item of Form (Identify)	Answer																				
Item 10	<p>Item 10 Conditions for managing accounts</p> <p>PBI provides investment supervisory services and also holds itself out as providing financial planning services. Minimum dollar amounts are required to establish certain managed accounts as outlined in the table below:</p> <table border="1"> <thead> <tr> <th>Program</th> <th>Minimum Initial Investment</th> </tr> </thead> <tbody> <tr> <td>Asset Advisor</td> <td>\$50,000</td> </tr> <tr> <td>FundSource</td> <td>\$25,000</td> </tr> <tr> <td>Custom Choice</td> <td>\$25,000</td> </tr> <tr> <td>DMA</td> <td>\$150,000</td> </tr> <tr> <td>Masters</td> <td>\$100,000</td> </tr> <tr> <td>Network</td> <td>\$100,000</td> </tr> <tr> <td>Compass</td> <td>\$100,000</td> </tr> <tr> <td>Dynamic 401(k)</td> <td>\$50,000</td> </tr> <tr> <td>DAAS</td> <td>\$25,000</td> </tr> </tbody> </table> <p>Under certain circumstances the minimum may be waived or reduced, including for related accounts that may be combined to meet minimum requirements.</p>	Program	Minimum Initial Investment	Asset Advisor	\$50,000	FundSource	\$25,000	Custom Choice	\$25,000	DMA	\$150,000	Masters	\$100,000	Network	\$100,000	Compass	\$100,000	Dynamic 401(k)	\$50,000	DAAS	\$25,000
Program	Minimum Initial Investment																				
Asset Advisor	\$50,000																				
FundSource	\$25,000																				
Custom Choice	\$25,000																				
DMA	\$150,000																				
Masters	\$100,000																				
Network	\$100,000																				
Compass	\$100,000																				
Dynamic 401(k)	\$50,000																				
DAAS	\$25,000																				
Item 12	<p>Investment or Brokerage Discretion</p> <p>PBI permits its advisory representatives, under certain circumstances, to manage accounts on a discretionary basis. The advisory representative may charge fees or commissions for discretionary accounts. Some managed accounts offered by WSLLC through FCC provide full discretion to outside money managers that are chosen by the client, PBI and/or WSLLC. When discretion is utilized, it is limited by prohibiting those granted discretion from withdrawing funds and/or securities from the client's account with the exception of the deduction of management fees agreed to by the client. Additionally, under some of the wrap programs offered by WSLLC through FCC, PBI is granted discretion to remove or replace investments, funds or third party money managers for its client's accounts.</p> <p>As an advisor, PBI recommends to its clients that they use the firm's clearing broker-dealer for custodial and brokerage services for wrap accounts offered by WSLLC. The fees and/or commissions charged by</p> <p>PBI for its advisory services as well as for execution services as a broker-dealer may be available at a lower cost elsewhere. Clients are required to use PBI's broker-dealer for any wrap programs offered by WSLLC through FCC.</p> <p>Occasionally, order errors may occur. When they do, PBI corrects the error in a manner which makes the client whole. Any losses resulting from order errors are absorbed by PBI.</p>																				

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Item of Form (Identify)	Answer
Item 13	<p>Additional Compensation</p> <p>PBI's advisory representatives also sell securities and insurance products, in their separate capacities as registered representatives and insurance agents, for sales commissions. Some of the advice offered by advisory representatives involve investments in mutual fund products. Load and no-load mutual funds may pay annual distribution charges, sometimes referred to as a 12(b)-1 fee. The advisory representatives may receive a portion of the 12(b)-1 fee from some investment companies in their separate capacities as registered representatives. Clients should be aware that these 12(b)-1 fees come from fund assets, and thus, indirectly from client's assets. The receipt of these fees could represent an incentive for registered representatives to recommend funds with 12(b)-1 fees or higher 12(b)-1 fees over funds with no fees or lower fees, therefore creating a potential conflict of interest. While the advisory representatives of PBI endeavor at all times to put the interest of the clients first as part of their fiduciary duty, clients should be aware that the receipt of additional compensation itself creates a conflict of interest, and may affect the judgment of the advisory representatives when making recommendations.</p> <p>PBI also benefits by recommending the programs and services of FCC and WSLLC. These firms provide services to PBI which enhance PBI's operations and support structure. For example, these firms may provide software, research, reporting capabilities, fee-billing assistance, compliance notices, account access and order entry services which, if not provided, would have to be obtained elsewhere. Because such services are provided for little or no cost, a conflict of interest exists when PBI recommends these firms to clients for custody and brokerage services.</p> <p><u>Solicitation Arrangements</u> - PBI enters into agreements with Solicitors (Referring Parties) to refer clients to PBI. If a referred client enters into an investment advisory agreement with PBI, a cash referral fee may be paid to the referring party, which is based upon a percentage of the client advisory fees that are generated. PBI also enters into solicitation arrangements with other advisors or money managers to refer PBI's clients to outside programs. Under these circumstances PBI and/or its advisor representatives may be paid a cash referral fee, which is based upon a percentage of the client advisory fees that are generated. In either circumstance the referral agreements between any referring party and PBI, and vice versa, will not result in any charges to clients in addition to the normal level of advisory fees charged. However, a conflict may occur as the fees paid to the referrer may be greater than fees derived by referring the client to another advisor.</p> <p><u>Signal Selling</u> – In addition to managing individual client assets PBI, through Matthew Pavich, may engage in selling the signal generated under the DAAS program to other Investment Advisors. Depending on the terms of the contract, PBI may receive an annualized fee of 25 -50 basis points of the assets managed using this signal.</p> <p><u>PBI's Relationship With FCC</u> – PBI utilizes FCC for clearing and custodial services. As a result, PBI may receive income from FCC as it relates to these clearing and custodial services.</p>

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Item of Form (Identify)	Answer
	<p style="text-align: center;">PRIVACY STATEMENT</p> <p>The Securities and Exchange Commission has implemented Regulation S-P, which relates to the privacy of consumer financial information. Regulation S-P and the Gramm-Leach-Bliley Act limit investment companies, broker-dealers and registered investment advisers in their disclosure of consumer's and customer's nonpublic personal information. Regulation S-P also requires that financial institutions provide privacy notices in various instances and to adopt policies and procedures to protect the personal information of its consumers and customers. This statement describes our firm's privacy policy and how we handle your personal information. This policy applies to former, current, and prospective customers.</p> <p>Presidential Brokerage, Inc., is Committed to Protecting Your Privacy</p> <p>We respect every individual's right to privacy. We understand the importance you place on the privacy and security of information that personally identifies you or your account information.</p> <p>Why and How We Collect Personal Information</p> <ol style="list-style-type: none"> 1. We are required by guidelines of our industry, such as New York Stock Exchange Rule #405, <i>Know Your Customer</i>, to obtain personal information about you for the purpose of providing investment recommendations, evaluating your financial needs, processing your requests and transactions, and providing customer service. The personal information we collect about you includes: 2. Information we receive from you to open an account or provide investment advice to you. This information typically includes your home address, telephone number and financial information. 3. Information that we access or generate to service your account, such as account statements and securities holdings. 4. Information that we may receive from third parties with respect to your account, such as accounts you may have at other financial institutions or trade confirmations with other brokerage firms. <p>We Protect the Confidentiality of Your Personal Information in the Following Manner</p> <ol style="list-style-type: none"> 1. We do not sell personal information to anyone. 2. We disclose personal information only as required by law or with your permission. 3. We disclose or report personal information in limited circumstances where we believe in good faith that disclosure is required under law, to cooperate with regulators or law enforcement authorities, or to protect our rights or property. 4. We use personal information in ways that are compatible with the purposes for which we originally requested it. For example, we will use the information you give us to process your requests and transactions, to provide you with additional information about products and services, or to evaluate your financial needs. To do so, we may share personal information with an agent or affiliate. 5. We limit the collection and use of personal information to what is necessary to administer our business and to deliver services to you. This may include advising you about our products or services.

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Item of Form (Identify)	Answer
	<p>When We Share Your Personal Information With Our Affiliates</p> <p>In order for us to provide investment recommendations to you, we may disclose your personal information in very limited instances which include:</p> <ol style="list-style-type: none"> Disclosures to companies as permitted by law, including those necessary to service your account, such as providing account information to our fully disclosed clearing firm and/or and custodians Disclosures to companies that perform services on our behalf, such as mailings pertaining to products and services <p>Presidential Brokerage, Inc., is a fully disclosed correspondent firm of First Clearing Corp.(FCC), a division of First Union Corp. FCC conducts numerous functions for Presidential Brokerage, Inc., including securities transactions, record keeping, receipt of and disbursements of funds, generation and distribution of account statements, and acts as custodian for all securities held in street name. FCC maintains very strict privacy guidelines and your personal information is protected in this relationship through a strict confidentiality agreement.</p> <p>How We Protect Your Personal Information That We Share With Our Affiliates</p> <p>When we share personal information with an agent or affiliate, we protect that information with a confidentiality agreement. Companies that we hire to provide support services or act as our agent must conform to our privacy standards. Our internal policies prohibit employees who have access to our customer's personal information from using or disclosing the information except for the appropriate business use of Presidential Brokerage, Inc. All employees are required to sign a confidentiality agreement that requires them to protect your personal information.</p> <p>Updating Your Personal Information</p> <p>We will give you reasonable access to the information we have about you. Most of this information is contained in account statements that you receive and applications that you submit to obtain our products and services. The accuracy of your personal information is important. We encourage you to review this information and notify us of needed updates and/or changes. Please call us at 800-230-1288.</p>