

# **Edward G. Leeper**

## **M Group Investment Advisor, LLC**

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Winter Garden, FL 34787

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**March 2, 2021**

### **FORM ADV PART 2B BROCHURE SUPPLEMENT**

This brochure supplement provides information about Edward G. Leeper that supplements the M Group Investment Advisor, LLC brochure. You should have received a copy of that brochure. Please contact us at 541-708-1922 if you did not receive M Group Investment Advisor, LLC's brochure or if you have any questions about the contents of this supplement.

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

## Item 2 Educational Background and Business Experience

Edward G. Leeper is an Investment Advisor Representative of M Group Investment Advisor, LLC. Mr. Leeper, born in 1971, is dedicated to serving the Clients of M Group Investment Advisor, LLC. Mr. Leeper earned a Bachelor's of Science from Corban University in 1995 with a Physical Education k-12 concentration. Additional information regarding Mr. Leeper's employment history is included below.

### Employment History:

|   |                    |
|---|--------------------|
| M Group Investment Advisor, LLC,<br>Investment Advisor Representative | 04/2012 to Present |
| Kelly Wright Real Estate<br>Licensed Real Estate Agent                | 03/2020 to Present |
| RE/MAX South<br>Licensed Real Estate Agent                            | 01/2017 to 03/2020 |
| Sanofi, Sales Rep   | 04/2005 to 01/2015 |

## Item 3 Disciplinary Information

***There are no legal, civil or disciplinary events to disclose regarding Mr. Leeper.***

Mr. Leeper has never been involved in any regulatory, civil or criminal action. There have been no client complaints, lawsuits, arbitration claims or administrative proceedings against Mr. Leeper.

Securities laws require an advisor to disclose any instances where the advisor or its advisory persons have been found liable in a legal, regulatory, civil or arbitration matter that alleges violation of securities and other statutes; fraud; false statements or omissions; theft, embezzlement or wrongful taking of property; bribery, forgery, counterfeiting, or extortion; and/or dishonest, unfair or unethical practices. ***As previously noted, there are no legal, civil or disciplinary events to disclose regarding Mr. Leeper.*** However, we do encourage you to independently view the background of Mr. Leeper on the Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov). Select Investment Adviser Search from the left navigation menu. Then select the option for Investment Adviser Representative and enter **6059764** in the field labeled "Individual CRD Number".

## Item 4 Other Business Activities

### M Group Wealth & Insurance, LLC

Mr. Leeper is the owner and independent insurance agent of M Group Wealth & Insurance. As an independent insurance agent, Mr. Leeper may receive customary wages, commissions, and other related revenues from M Group Wealth & Insurance. The insurance agent activities represent approximately 20% of the business time of Mr. Leeper.

### Kelly Wright Real Estate

Mr. Leeper is an independent real estate agent of Kelly Wright Real Estate. As an independent real estate agent, Mr. Leeper may receive customary wages, commissions, and other related revenues

from Kelly Wright Real Estate. The real estate agent activities represent approximately 10% of the business time of Mr. Leeper.

## **Item 5 Additional Compensation**

Mr. Leeper is dedicated to the investment advisory activities of M Group's Clients. As noted above, Mr. Leeper receives commissions for the implementation of insurance recommendations.

## **Item 6 Supervision**

Mr. Leeper serves as an Investment Advisor Representative of M Group and is supervised by John Marcelia, Principal and the Chief Compliance Officer. Mr. Marcelia can be reached at (541) 708-1922.

M Group has implemented a Code of Ethics and internal compliance that guide each employee in meeting their fiduciary obligations to Clients of M Group. Further, M Group is subject to regulatory oversight by various agencies. These agencies require registration by M Group and its employees. As a registered entity, M Group is subject to examinations by regulators, which may be announced or unannounced. M Group is required to periodically update the information provided to these agencies and to provide various reports regarding the business activities and assets of the Advisor.

M Group Investment Advisor does not engage in the sale of insurance products to advisory clients. However, certain of M Group's representatives, in their individual capacities, are licensed insurance agents, and may recommend the purchase of certain insurance-related products on a commission basis. Clients can engage certain of M Group's representatives to purchase insurance products on a commission basis. Any activity by your investment adviser representative as an insurance agent is separate from and outside of his or her role on behalf M Group.