

Joseph (Joe) McFadden, MBA, CFA®, CFP®

Brochure Supplement

(Part 2B of Form ADV)

Dated 09/21/2026

ProVise Management Group, LLC

SEC File Number: 801 – 32172

300 Park Place Blvd., Suite 210

Clearwater, Florida 33759

www.provise.com

This brochure supplement provides information about Joe McFadden that supplements the ProVise Management Group, LLC (“ProVise”) brochure. You should have received a copy of that brochure. Please contact Shane O’Hara, Chief Compliance Officer at (727) 441-9022 or info@provise.com if you did not receive ProVise’s brochure or if you have any questions about the contents of this supplement.

Additional information about Joe McFadden is available on the SEC’s website at <https://adviserinfo.sec.gov/>.

The information in this brochure supplement has not been approved or verified by the United States Securities and Exchange Commission or by any state securities authority.

Educational Background and Business Experience

Joe McFadden was born in 1966. He graduated from the University of South Florida (USF) with a Bachelor of Arts degree in Finance and Economics. In the years to follow, he earned a CFA® charter, an MBA from the University of Chicago in Accounting and Finance, and his CERTIFIED FINANCIAL PLANNER® certification. These certifications are explained in further detail below.

- **CERTIFIED FINANCIAL PLANNER® or (CFP®)** – Issued by the Certified Financial Planner Board of Standards (202-379-2200, www.cfp.net). The CFP® certification is conveyed to financial professionals who have met rigorous professional standards and have agreed to the principles of integrity, objectivity, competence, fairness, confidentiality, professionalism and diligence when dealing with clients. Successful candidates must typically hold a Bachelor's degree, complete a required course of study, hold relevant work experience, pass a background check, pass an extensive examination and comply with a code of ethics. Continuing Education Requirements - 30 hours every two years.
- **CHARTERED FINANCIAL ANALYST® (CFA®)** – The Chartered Financial Analyst® designation is conferred by the CFA Institute (800) 247-8132, www.cfainstitute.org. To obtain the CFA® designation, an individual must: complete a bachelor's program or equivalent program, pass three sequential six-hour examinations, accumulate a minimum of three sequential years of qualified work experience, become a member of the CFA Institute, and annually attend to and comply with the CFA Institute Code of Ethics and Standards of Professional Conduct. The CFA Institute does not impose mandatory continuing education requirements. However, charterholders are encouraged to complete 20 hours of continuing education annually, including a minimum of two hours on Standards, Ethics, and Regulations (SER).
- **Master of Business Administration (MBA)** – Issued by an accredited college or university. The MBA is a postgraduate degree that is awarded to students who have mastered the study of business. Students of MBA programs study the theory and application of business and management principles.

With over 30 years of business and financial planning experience, Joe has served as a Portfolio Manager and Wealth Advisor at SWM Advisors, an Investment Director with Aberdeen Standard Investments, and a Vice President at Raymond James Financial.

In August 2025, Joe joined ProVise Management Group, LLC (“ProVise”) as a Financial Planner.

Disciplinary Information

NONE

Outside Business Activities

NONE

Additional Compensation

NONE

Supervision

ProVise has established a system of compliance and supervision we believe is reasonably designed to oversee the activities of Joe McFadden in accordance with applicable law. Shane O'Hara, Executive Vice President and CCO, is his designated supervisor. Shane (and/or his designee) monitors Joe's activities throughout our client relationship management system and with frequent office interactions. Shane O'Hara may be contacted via email at ohara@proviser.com or via phone at 727- 441-9022, ext. 212.