

Daniel R. Mannix, CFA®

Brochure Supplement

(Part 2B of Form ADV)

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ProVise Management Group, LLC

SEC File Number: 801 – 32172

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This brochure supplement provides information about Daniel R. Mannix that supplements the ProVise Management Group, LLC (“ProVise”) brochure. You should have received a copy of that brochure. Please contact V. Raymond Ferrara, 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 Daniel R. Mannix 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

Daniel Mannix was born in 1984. He graduated from the University of South Florida with a Bachelor's of Science degree in Finance. In the years to follow, he obtained his FINRA securities and research analyst licenses and became a CFA® charterholder. A CFA® charterholder is explained in further detail below:

- **CHARTERED FINANCIAL ANALYST® (CFA®)** – Chartered by the CFA Institute (800-247-8132, www.cfainstitute.org). The CFA® is chartered to financial professionals who have met rigorous professional standards with over 1000 hours of study, along with a minimum of four years of professional experience, successful completion of the CFA® program and have attested to the CFA Institute Code of Ethics and Standards of Professional Conduct. Successful candidates must typically hold a Bachelor's degree, complete 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 - 20 hours, with a minimum of two hours in the topics of Standards, Ethics, and Regulations (SER) each calendar year.

After graduating from USF, Daniel relocated to Jacksonville, FL and began his financial career at Deutsche Bank on their Convertible Bonds Trading Desk Support team. In October 2009, he decided to move to New Jersey and in January 2010, accepted a position with Goldman Sachs & Co. through Control Associates as a Listed Derivatives Fees Analyst. After seven months, Daniel relocated to New York City and went to work for JP Morgan Securities, LLC as an Interest Rate Derivatives Sales Assistant. Yearning for the Florida sunshine, Daniel moved back to the Tampa Bay area in November 2012 and joined Raymond James & Associates as an Equity Research Associate (and later Senior Equity Research Associate) covering the Financials and Real Estate sectors.

In February 2020, Daniel joined ProVise as a Portfolio Manager. He is also registered with Kestra Investment Services, LLC, a Broker-Dealer and member of FINRA/SIPC.

Disciplinary Information

NONE

Outside Business Activities

Kestra Investment Services, LLC – Registered Representative

ProVise is affiliated with Kestra Investment Services, LLC (“Kestra IS”). Although registered with Kestra IS, Daniel is a non-income producing representative and does not receive compensation in any form from Kestra IS. His time spent on this activity is 15%.

Additional Compensation

NONE

Supervision

ProVise has established a system of compliance and supervision we believe is reasonably designed to oversee the activities of Daniel Mannix in accordance with applicable law. Ray Ferrara, Executive Chair and CCO, is his designated supervisor. Ray (and/or his designee) monitors Daniels's activities throughout our client relationship management system and with frequent office interactions. Ray Ferrara may be contacted via email at ferrara@proviser.com or via phone at 727-441-9022, ext. 232.