

Peter Seriano, CFP®

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 Peter Seriano 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 Peter Seriano is available on the SEC’s website at www.sec.gov/investor/brokers.htm.

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

Peter Seriano was born in 1980. He is a CERTIFIED FINANCIAL PLANNER™ Professional with over 15 years in the financial services industry and has partnered with families and small business owners to plan for their futures. Peter holds his FINRA 6, 7, 9, 63, and 66 licenses and is also an Investment Adviser Representative. Areas of expertise include retirement and investment planning. His designation is explained in further detail below:

- **CERTIFIED FINANCIAL PLANNER™ (CFP®)** – Issued by the Certified Financial Planner Board of Standards (202-379-2200, www.cfp.net). The CFP® designation 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 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.

Peter graduated from the University of South Florida with a Bachelor of Science degree in Business Management and gained experience from his previous positions at other financial institutions. Peter focuses on understanding what is most important to his client's personal and financial goals, which he then uses to create a customized financial plan. Peter finds great satisfaction when his clients can achieve their goals on a plan they made together.

Peter was born in Chicago, IL but has resided in FL since 1989. Peter has been married to his wife, Jessica, since 2006. They have a daughter who plays Division II softball for Bemidji State University and a son who is a black belt in Taekwondo. Peter enjoys coaching his son's baseball team, playing ice hockey, and golf in his spare time.

In 2022, Peter joined ProVise Management Group, LLC (“ProVise”) as a Financial Planner. He is also a Registered Representative of 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”). Peter, in his separate and individual capacity, may receive commissions, bonuses and other compensation based on the sale of securities or other investment products as a registered representative of Kestra Investment Services, LLC (Broker-Dealer). This may create a conflict of interest and give him an incentive to recommend products based on the compensation received, rather than on the client’s needs. However, as a CFP® professional, Peter is bound to a Code of Ethics to work with his clients on

a fiduciary basis placing his client's interests ahead of his own. Additionally, as an investment advisor representative of ProVise, he is also required to act as a fiduciary. Thus, conflicts such as the one above, if they cannot be eliminated, are disclosed and managed. If Peter sells an investment product on a commission basis, ProVise generally does not charge an advisory fee in addition to the commission you pay for such product. Conversely, when ProVise receives advisory fees for its services, Peter does not also receive commission for such advisory services. However, you may engage ProVise to provide investment management services on an advisory fee basis and separately Peter, in his capacity as an agent of a broker-dealer, may also receive compensation, from the sale of a certain security or investment products recommended. Any compensation received from Kestra IS is assigned to ProVise. His time spent on this activity is less than 5%.

Additional Compensation

NONE

Supervision

ProVise has established a system of compliance and supervision we believe is reasonably designed to oversee the activities of Peter Seriano in accordance with applicable law. Ray Ferrara, Executive Chair and CCO, is his designated supervisor. Ray (and/or his designee) monitors Peter'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.