

ITEM 1: COVER PAGE

Weiser Financial Group

Firm Brochure – Form ADV Part 2A & 2B

This brochure provides information about the qualifications and business practices of Weiser Financial Group. If you have any questions about the contents of this brochure, please contact us at (941) 363-1004 or by email at WeiserFinancialGroup@ProtonMail.com. The information in this brochure has not been approved or verified by the United States Securities and Exchange Commission or by any state securities authority.

Additional information about Weiser Financial Group is also available on the SEC's website at www.adviserinfo.sec.gov. Weiser Financial Group's CRD number is: 148110.

*Mailing Address:
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Sarasota, FL 34242*

*Principal Office Location:
871 Venetia Bay Boulevard #203
Venice, FL 34285
(941) 363-1004*

*WeiserFinancialGroup@ProtonMail.com
<https://www.WeiserFinancialGroup.com>*

Registration as an investment advisor does not imply a certain level of skill or training.

Revision Date: 03/13/2024

Previous Revision Date: 09/23/2023

ITEM 2: MATERIAL & NON-MATERIAL CHANGES

The material and non-material changes in this brochure, compared to the last updating amendment of Weiser Financial Group (hereinafter 'Advisor') dated 09/23/2023, are described below.

Material changes refer to modifications to the registered investment adviser's Form ADV that are considered significant and could have an impact on clients or the adviser's business operations. These changes are substantive in nature and could affect clients' decision-making or the adviser's ability to provide services.

Non-material changes refer to modifications to the registered investment adviser's Form ADV that are considered minor and do not have a significant impact on clients or the adviser's business operations. These changes are generally administrative or procedural in nature, and they do not alter the fundamental nature of the adviser's services or the client-adviser relationship.

Material Changes

1. None

Non-Material Changes

2. None

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ITEM 4: ADVISORY BUSINESS

Description of the Advisory Firm

USRIA LLC d/b/a Weiser Financial Group (hereinafter "Advisor") is a Limited Liability Company organized in the State of Florida. The firm was formed in 2008 and is registered with Florida and other states. Daniel J. Weiser, a Series 65 Licensed Investment Advisor Representative, is the Designated Principal of the firm.

Types of Advisory Services

Sub-Advisor Investment Manager Services

Advisor will direct clients to Sub-Advisors to manage all or a portion of the client's assets. Before selecting other Sub-Advisors for clients, Advisor will always ensure those other Sub-Advisors are properly licensed or registered as an investment adviser. Advisor conducts due diligence on any Sub-Advisor, which may involve one or more of the following: phone calls, meetings and review of the Sub-Advisor's performance and investment strategy. Advisor then directs investments with a Sub-Advisor by referring the client to the Sub-Advisor. Advisor will have an ongoing relationship with the client to help review the suitability, evaluate the services of the Sub-Advisor, and update as needed. Advisor will review the ongoing performance of the Sub-Advisor. The Sub-Advisor will conduct ongoing research regarding the investments, select investments, and manage the client's portfolio. The Sub-Advisor will monitor the account on an ongoing basis, consistent with the client's investment objectives and risk tolerance.

Written Acknowledgement of Fiduciary Status

When we provide investment advice to you regarding your retirement plan account or individual retirement account, we are fiduciaries within the meaning of Title I of the Employee Retirement Income Security Act and/or the Internal Revenue Code, as applicable, which are laws governing retirement accounts. The way we make money could possibly create some conflicts with your interests, so we operate under a special rule that requires us to act in your best interest and not put our interest ahead of yours. Under this special rule's provisions, we must:

- a. Meet a professional standard of care when making investment recommendations (give prudent advice).
- b. Never put our financial interests ahead of yours when making recommendations (give loyal advice).
- c. Avoid misleading statements about conflicts of interest, fees, and investments.
- d. Follow policies and procedures designed to ensure that we give advice that is in your best interest.
- e. Charge no more than is reasonable for our services.
- f. Give you basic information about conflicts of interest.

Services Limited to Specific Types of Investments

Advisor will limit their investment advice to mutual funds, real estate funds and ETFs.

Wrap Fee Programs

A wrap fee program is an investment program where the investor pays one stated fee that includes management fees, transaction costs, fund expenses, and other administrative fees. Clients participate in a Sub-Advisors Wrap Fee Program.

Notices

All written notices to Advisor shall be sent by either 1) fax (941) 870-7863 with confirmation of delivery or 2) United States Postal Service with signature confirmation of delivery to: Weiser Financial Group LLC, 6547 Midnight Pass Road, Box 11, Sarasota, Florida 34242.

All correspondence, notices, and disclosures to Client will be provided utilizing the email address of record, or such other address as may be provided by Client in writing, that Client provides to Advisor. If Clients do not agree to electronic notice & access and/or electronic delivery of written notices and prefer delivery in paper format, they must notify Advisor by approved delivery methods listed in paragraph one.

Risk Acknowledgement

Advisor does not guarantee the future performance of Clients Account(s) or any specific level of performance. Clients understand that the market values of the securities in the Account(s) will fluctuate. Shares redeemed may be worth more or less than Clients original purchase price. Advisor will not be liable to Client for any loss that Client may suffer as a result of 1) good faith decisions or actions by the Advisor 2) caused by Advisor following Client's instructions 3) caused by the Sub-Advisor or Custodian. Client understands Sub-Advisors use different investment approaches, with related risk factors, and fees associated with investing. There is no guarantee that Client's investment objectives will be achieved, and that past performance is not a guarantee of future results. Client further understands that Advisor shall not have any liability for Client's failure to inform Advisor in a timely manner of any material change in Client's financial circumstances which might affect the manner in which Client's assets are invested, or for Client's failure to provide Advisor with information pertaining to Client's financial status as Advisor may reasonably request.

Effective Date and Termination of Advisors Client Agreement

The Advisors' Client Agreement shall become effective on the date it is signed and accepted by both Client and Advisor and shall remain in effect until terminated by either party. Either party may terminate the Agreement for any reason upon written notice to the other party. Termination by Client is effective upon receipt of written notice by the Advisor. Termination by Advisor is effective thirty (30) days from the delivery date of notice to Client. Client's death, disability, or incompetency will not automatically terminate or change the terms of the Advisors Client Agreement; however, Client's authorized representative(s) may cancel the Advisors Client Agreement by providing written notice to Advisor.

Summary of Duties & Responsibilities of the Advisor, Sub-Advisor, & Custodian

1. Advisor is listed as the primary “Advisor” on clients’ accounts and Financial Engines Advisors L.L.C. (formerly known as Edelman Financial Engines and/or The Edelman Managed Asset Program) is listed as the clients “Sub-Advisor.”
2. Advisor duties include opening a clients account, assisting with asset model selection, ongoing client service, best interest responsibility, delivery of information and being the primary point of contact for clients.
3. Advisor shall not make any representations regarding Sub-Advisor or the Program that are false or misleading or in any way inconsistent with written materials provided by Sub-Advisor, nor will Advisor provide any written materials, including but not limited to advertisements, to Clients concerning Sub-Advisor or the Program that have not been specifically prepared and provided in advance by Sub-Advisor in writing.
4. Advisor marketing materials related to the Asset Allocation Models used must adhere to Rule 206(4)-1 of the Advisers Act and shall be reviewed and preapproved by Sub-Advisor prior to the Advisor’s dissemination. All written materials provided by Sub-Advisor to Advisor, including without limitations, all brochures, advertisements, its Form ADV Part 2A and 2B, are, and as of the date provided to the Advisor will be, materially accurate and contain no material misrepresentations or omissions.
5. Advisor, based on Client’s stated investment objectives and financial situations as well as any other relevant information provided to Advisor, will instruct Sub-Advisor to invest client’s assets into a specific Asset Allocation Model and execute transactions on behalf of Client provided that any such transactions are, in Advisor’s good faith view consistent with Client’s goals and objectives, suitable for Client’s circumstances; and are consistent with its investment advisory obligations.
6. Advisor will rely on Sub-Advisor to arrange for the execution of securities transactions for the Account.
7. Advisor does not guarantee the future performance of the Account(s) or any specific level of performance, the success of any investment decision or strategy that Advisor may use or the success of Advisor’s overall management of the Account. Client understands that investment decisions made for Client’s Account are subject to various market, currency, economic, political, business, and other risks, and that those investment decisions will not always be profitable. Advisor’s Form ADV provides a more complete list of such risks. Client understands that Advisor shall not have any liability for Client’s failure to inform Advisor in a timely manner of any change in Client’s financial circumstances that might affect the manner of which Client’s assets are invested, or for Client’s failure to provide Advisor with information pertaining to Client’s financial status as Advisor may reasonably request.

8. Advisor serves as investment manager for other clients and will continue to do so. Client also understands that Advisor and their personnel and affiliates (“Affiliated Persons”) may give advice or take action in performing their duties to other clients, or for their own accounts, that differ from advice given to or action taken for Client.
9. Advisor and any of their officers, directors or employees will not be liable to Client for 1) any loss that Client may suffer by reason of any investment decision made or other action taken or omitted in good faith by Advisor unless through the gross negligence, reckless conduct or intentional misfeasance of such person 2) any loss arising from adherence to Client’s instructions 3) any act or failure to act by Custodian, any broker or dealer to which Sub-Advisor directs transactions for the Account, or by any other third party. (Except as may be otherwise be provided by law)
10. Advisor has a Pre-Dispute Arbitration Agreement with client that is outlined in the client agreements Client has with Advisor and Sub-Advisor.
11. Client will grant Sub-Advisor limited discretionary authority based on the instructions the Client provides to Advisor to 1) provide investment methodology and account allocation instructions based on the Client’s information and instructions provided by Advisor, consisting of a diversified mix of asset classes and investment securities primarily in the form of commingled investment funds, specifically, shares of open-ended registered investment companies and ETFs 2) modify or change the mix of asset classes and investment securities held in the Account(s) and 3) rebalance the Account(s) periodically. In order to carry out the above transactions, Advisor shall ensure that any such transactions are 1) consistent with Client’s goals and objectives 2) suitable for Client’s circumstances 3) made available by Charles Schwab to Client in a timely manner following execution of transactions, unless Client instructs Advisor to suppress the paper copies for all transaction confirmations and make them available to Client online only, as applicable.
12. Custodian will have custody of account assets. Neither Advisor nor Sub-Advisor will have custody of any assets in the Account.
13. Sub-Advisor is an investment advisor under the investment advisors act of 1940 and provides an asset allocation program consisting of allocation models utilizing combinations of unaffiliated investment products, including shares of open-end registered investment companies, exchange-traded funds, or equities.
14. Sub-Advisor provides this program of asset allocation models to Advisor through Advisors investment advisor representatives (IAR’s) who market the program and recommend the asset allocation models to their advisory clients using systems and services provided by and approved by Sub-Advisor.

15. Sub-Advisor duties include the management of asset allocation models, providing model investment guidelines and general information to Advisor to assist with Advisor's advisory service regarding the Program to the Client. Advisor will use the model information and provide a questionnaire, or similar tool, for use by Client to assist the Advisor in determining Client's risk profile, financial situation, investment objectives and Asset Allocation Model recommendation.
16. Sub-Advisor shall facilitate the collection of Advisors fees from the Client on behalf of the Advisor and remit a portion of the Account Fee to Advisor and retain a portion of the Account Fee for Sub-Advisors service as it relates to the Program.
17. Sub-Advisor contracts with Charles Schwab to 1) maintain custody of all Account assets 2) execute and perform clearance of all purchase and sale orders as directed by Sub-Advisor 3) perform all custodial functions customarily performed with respect to securities accounts 4) forward or make available to Client and Advisor confirmation of each purchase and sale and Client Account statements.
18. Sub-Advisor may not always be able to execute transactions on the same day they are requested by the Advisor due to cutoff times set by certain securities and investment providers. The current cutoff time for requests to be received by the Advisor from Clients is 12:00 PM EST.

New Account & Disclosure Documents from Advisor, Sub-Advisor, & Custodian For New Clients

Before you enter into the Advisor and Sub-Advisor Client Agreements and open a new account(s) through Advisor.

- You will receive an electronic notification with instructions for online access to these documents.
- Alternatively, you can opt for electronic delivery via PDF.

For Existing Clients

- You will receive electronic notifications for all non-annual updates.
- For annual updates you will receive notice of online access by March 31st of each year.

Printed Copies Documents

- If new or existing clients wish to receive a printed copy of any of these documents, please contact us, and we will arrange USPS delivery.
- All the documents are accessible on the Advisor's website at www.WeiserFinancialGroup.com

1. Advisor Form ADV Part 2A & 2B
2. Advisor Privacy Policy
3. Advisor Anti-Money Laundering (AML) Compliance Program Disclosure
4. Advisor Business Continuity Plan & Succession Disclosure
5. Advisor Special Tax Notice on Rollovers. IRS form 402(f)
6. Advisor Electronic Communication & Signature Form
7. Advisor Estimate of Account Management Fees
8. Advisor Client Agreement

9. Sub-Advisor Suitability Questionnaire
10. Sub-Advisor Guide to Portfolio Selection Questionnaire
11. Sub-Advisor Form ADV Part 2
12. Sub-Advisor Schedule H (Wrap Program)
13. Sub-Advisor Privacy Policy
14. Sub-Advisor client facing portfolio fact sheet for Clients selected portfolio
15. Sub-Advisors Turnkey Asset Management Program Client Service Agreement

16. Custodians Core Account Prospectus
17. Custodians IRA Rollover Designation Form
18. Custodians Account Transfer Form
19. Custodians IRA Account Application
20. Custodians ACH Moneylink for Monthly Withdrawals
21. Custodians IRA Distribution Form
22. Custodians Add a Trusted Contact Person
23. Custodians Limited Power of Attorney Form
24. Custodians Authorization to Pay Management Fees

ITEM 5: FEES AND COMPENSATION

Sub-Advisor Fees

Clients do not incur any extra upfront or ongoing costs when opening their Sub-Advisor account(s) through the Advisor. The Advisor's fee is covered by the Sub-Advisor's standard management fee, which is applied uniformly to all clients, whether their accounts are opened through an independent Advisor or directly with the Sub-Advisor in-house.

Advisor does not have an exclusive agreement with Sub-Advisor; Clients have the option to purchase Sub-Advisors investment products through Sub-Advisor directly or parties not affiliated with Advisor. Clients will not be asked to pay any fees to Advisor at any time. Advisor operates under an agreement with Sub-Advisor. Compensation to Advisor will not be based on a share of capital gains upon or capital appreciation of Clients funds or any portion of the Client funds.

When placing mutual funds under management of the Sub-Advisor the fees assessed by Sub-Advisor are in addition to the fees and expenses charged by the mutual fund companies. Disclosure of these fees and expenses are in the respective prospectuses for the mutual funds. The Sub-Advisors fee covers: Investment management and account-related services, commissions, trading costs, brokerage fees, securities custody and clearance services, automatic daily review, and rebalancing (if necessary) of client's accounts, and other administrative charges.

Sub-Advisor charges an annual fee, calculated, and debited quarterly from a clients account in arrears. This fee is based on the beginning and ending values of the account (adjusted for any money clients deposit or withdraw during the quarter). If clients move assets into or out of their account during the quarter, their fee is pro-rated so that they are charged only for the time their assets are in the account. Compensation to Sub-Advisor is not payable before services are provided. Client's quarterly statements will show the management fee for the quarter; Clients will also receive a year-end summary. Advisor receives a portion of the Sub-Advisory fee assessed by Sub-Advisor, as a Advisors Fee. There is no additional cost to a client related to the payment of the fee by the Sub-Advisor to Advisor. Advisor does not charge clients any additional Advisory fees or management fees. Clients may terminate their account at any time without penalty; the fee stops immediately upon termination.

Client Fee Schedule

Client Assets	Client Annual Fee Rate
\$0-400,000	1.75%
\$400,001-750,000	1.25%
\$750,001-1,000,000	1.00%
\$1,000,001-3,000,000	0.75%
\$3,000,001-10,000,000	0.60%
\$10,000,001-25,000,000	0.50%
\$25,000,000 +	Negotiable

Minimum account size is \$5,000. The minimum annual fee is \$100. Sub-Advisor may waive the minimum annual fee or the minimum account size at its sole discretion. When calculating advisory fees, Accounts within the household may be aggregated to determine the lowest fee if all Accounts are managed as one relationship. The underlying mutual funds held in Client Accounts incur their own internal expenses such as management, transfer agent, shareholding servicing, and Rule 12b-1 fees, no portion of which are received by Advisor.

ITEM 6: PERFORMANCE-BASED FEES & SIDE-BY-SIDE MANAGEMENT

Advisor does not accept performance-based fees or other fees based on a share of capital gains on the assets or capital appreciation of the assets of a client. Advisor does not engage in side-by-side management.

ITEM 7: TYPES OF CLIENTS

Advisor generally provides advisory services to the following types of clients:

1. Individuals
2. High-Net-Worth Individuals

ITEM 8: METHODS OF ANALYSIS, INVESTMENT STRATEGIES, & RISK OF LOSS

Advisor does not manage assets directly but will provide clients and all prospects whom Advisor recommends Sub-Advisor information regarding methods of analysis and investment strategies. This information will be explained in Part 2A brochure of the Sub-Advisor that Advisor will offer to all clients needing portfolio management services.

Past Performance

Past performance is not indicative of future results. Investing in securities involves a risk of loss that you, as a client, should be prepared to bear.

Selection of Sub-Advisers

Although Advisor will seek to select only Sub-Advisors who will invest clients' assets with the highest level of integrity, Advisors selection process cannot ensure that Sub-Advisors will perform as desired, and Advisor will have no control over the day-to-day operations of any of its selected Sub-Advisors. Advisor would not necessarily be aware of certain activities at the underlying Sub-Advisor level, including without limitation a Sub-Advisors engaging in unreported risks, investment "style drift" or even regulatory breaches or fraud.

ITEM 9: DISCIPLINARY INFORMATION

Criminal or Civil Actions

There are no criminal or civil actions to report.

Administrative Proceedings

There are no administrative proceedings to report.

Self-Regulatory Organization (SRO) Proceedings

There are no self-regulatory organization proceedings to report.

ITEM 10: OTHER FINANCIAL INDUSTRY ACTIVITIES & AFFILIATIONS

Advisor has no other Financial Industry Activities and/or Affiliations. Daniel James Weiser is an independent licensed real estate agent and insurance agent who does not offer either real estate or insurance products to clients of Advisor.

ITEM 11: CODE OF ETHICS, PARTICIPATION OR INTEREST IN CLIENT TRANSACTIONS AND PERSONAL TRADING

In accordance with SEC Rule 204A-1 of the Investment Advisers Act of 1940, Advisor maintains and enforces a Code of Ethics. The code contains requirements regarding independent contractors of the Advisor compliance with all laws, rules, and regulations, and contains provisions for reporting violations of the Code to the Firm's Chief Compliance Officer. The Florida Office of Financial Regulation does not require that certain of our personnel (called "Access Persons") report their personal securities holdings and transactions or obtain pre-approval of certain investments such as initial public offerings and limited offerings. To review a copy of the Advisors Code of Ethics, please contact Advisor.

ITEM 12: BROKERAGE PRACTICES

Advisor does not trade client's accounts or recommend broker/custodians. Advisor does not trade client's accounts and therefore receives no research, product, or services from a broker-dealer ("soft dollar benefits"). Advisor does not have the ability to block trade purchases across accounts. Advisor receives no referrals from a broker-dealer or third party in exchange for using that broker-dealer or third party.

ITEM 13: REVIEW OF ACCOUNTS

Client accounts managed by the Sub-Advisor are monitored and reviewed at least annually with the client by Daniel James Weiser, Chief Compliance Officer, with regard to client's investment policies and risk tolerance levels. Reviews may be triggered by material market, economic or political events, or by changes in client's financial situations (such as retirement, termination of employment, physical move, or inheritance). Each client of Advisors' advisory services provided on an ongoing basis will receive a quarterly report detailing the client's account, including assets held, asset value, and calculation of fees. This written report will come directly from the custodian and not through the Advisor.

ITEM 14: CLIENT REFERRALS AND OTHER COMPENSATION

Economic Benefits Provided by Third Parties for Advice Rendered to Clients
None

Compensation to Non – Advisory Personnel for Client Referrals

Advisor does not directly or indirectly compensate any person who is not advisory personnel for client referrals.

ITEM 15: CUSTODY

Advisor does not take custody of client accounts at any time. Custody of client's accounts is held primarily at the client's custodian. Clients will receive account statements from the custodian and should carefully review those statements for accuracy.

ITEM 16: INVESTMENT DISCRETION

Advisor does not have discretion over client accounts at any time.

ITEM 17: VOTING CLIENT SECURITIES (PROXY VOTING)

Advisor will not ask for, nor accept voting authority for client securities. Clients will receive proxies directly from the issuer of the security or the custodian. Clients should direct all proxy questions to the issuer of security.

ITEM 18: FINANCIAL INFORMATION

Balance Sheet

Advisor neither requires nor solicits prepayment of more than \$500 in fees per client, six months or more in advance, and therefore is not required to include a balance sheet with this brochure.

Financial Conditions

Neither Advisor nor its management has any financial condition that is likely to reasonably impair Advisors ability to meet contractual commitments to clients.

Bankruptcy Petitions in Previous Ten Years

Advisor has not been the subject of a bankruptcy petition in the last ten years.

ITEM 19: REQUIREMENTS FOR STATE REGISTERED ADVISERS

Principal Executive Officers and Management Persons

Advisor currently has only one management person: Daniel James Weiser. Education and business background can be found on the individual's Form ADV Part 2B brochure supplement.

Other Businesses in Which This Advisory Firm is Engaged

None.

Calculation of Performance-Based Fees and Degree of Risk to Clients

Advisor does not accept performance-based fees or other fees based on a share of capital gains or capital appreciation of the assets of a client.

Material Disciplinary Disclosures for Management Persons of this Firm

There are no civil, self-regulatory organization, or arbitration proceedings to report under this section

Material Relationships That Management Persons Have With Issuers of Securities

None

ITEM 20: PART 2B OF FORM ADV: BROCHURE SUPPLEMENT

This Brochure Supplement provides information about the Investment Advisor Representatives of Weiser Financial Group. Additional information about Daniel J. Weiser is available on the SEC's website at www.adviserinfo.sec.gov

Educational Background

Dan was born in 1958 and earned a Bachelor of Science degree in Aviation and a master's degree in education (MAED).

Business Background

Dan has over 16 years of investment advisor experience. He has a unique blend of knowledge for an investment advisor. He is a retired commercial pilot of 30 years (B-767 Captain), spent a decade as a 401(k)-plan trustee and airline retirement committee chair and holds Insurance and Real Estate Licenses.

Employment History

Dan enjoyed a 25-year career at Airborne Express as a pilot. While still flying he worked for a short time in 2008 for Financial Leadership Advisors as an investment advisor representative. Feeling he could better serve clients as an independent advisor he founded Weiser Financial Group in 2008.

Professional Licenses

Dan holds Securities, Insurance, and Real Estate Licenses. Dan is not actively involved in the insurance or real estate industry.

Disciplinary Information

Dan has no legal or disciplinary events to report.

Other Business-Related Activities

Dan is not actively engaged in any other investment-related or non-investment-related businesses or occupations.

Additional Compensation

None

Supervision

Dan provides investment advisory services in accordance with Weiser Financial Group LLC's Written Supervisory Procedures Manual, Weiser Financial Group's Form ADV Part 1, Form ADV Part 2 and The Florida Office of Financial Regulation (FLOFR) Division of Securities Investment Advisor Guide. The primary purpose of the Weiser Financial Group LLC's Written Supervisory Procedures Manual is to comply with the requirements of the Florida Statutes and Florida Administrative Code. Dan can be reached at WeiserFinancialGroup@ProtonMail.com or by calling (941)-363-1004.