

This brochure supplement provides information about James Ball that supplements the Accurate Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact James Ball if you did not receive Accurate Wealth Management, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about James Ball is also available on the SEC's website at www.adviserinfo.sec.gov.

Accurate Wealth Management, LLC
Form ADV Part 2B – Individual Disclosure Brochure

for

James Ball

Personal CRD Number: 2844925

Investment Adviser Representative

Accurate Wealth Management, LLC
211 Nokomis Avenue South Venice, FL 34285
941-486-0305
jball@accuratewealth.com

UPDATED: 08//2022

Item 2: Educational Background and Business Experience

Name: James Ball

Born: 1945

Educational Background and Professional Designations:

Education:

BA Loras College - 1973

Business Background:

08/2022 – Present Registered Representative
AAG Capital, Inc.

08/2022 – Present Investment Advisor Representative
Accurate Wealth Management, LLC

09/2019 –08/2022 Investment Advisor Representative
IFG

10/2016 - 09/2019 LPL FINANCIAL LLC

B

09/2016 - 09/2019 LPL FINANCIAL LLC

IA

01/2015 - 09/2016 USA FINANCIAL SECURITIES CORPORATION

B

01/2015 - 09/2016 USA FINANCIAL SECURITIES CORPORATION

IA

01/2010 - 01/2015 WOODBURY FINANCIAL SERVICES, INC.

B

01/2009 - 01/2015 WOODBURY FINANCIAL SERVICES, INC.

IA

02/2009 - 12/2009 WOODBURY FINANCIAL SERVICES, INC.

IA

02/2008 - 12/2008 NATIONAL PLANNING CORPORATION

B

02/2008 - 12/2008 NATIONAL PLANNING CORPORATION

IA

08/2007 - 02/2008 SPC

B

08/2005 - 02/2008 SIGMA FINANCIAL CORPORATION

B

04/2000 - 08/2005 NATIONWIDE SECURITIES, INC.

B

04/1998 - 03/2000 FRANKLIN FINANCIAL SERVICES CORPORATION

B

02/1997 - 03/1998 MUTUAL OF OMAHA INVESTOR SERVICES

Professional Designations

James Ball holds the following professional designations:

CFP® or Certified Financial Planner- To receive the CFP® designation an individual must satisfy an educational and experience requirement, successfully complete a CFP-board registered program (or be waived from the program due to another approved designation) and satisfy 30 hours of continuing education every two years. For additional information, refer to the CFP's website at www.cfp.net.

ChFC or Chartered Financial Consultant - To receive the ChFC designation, an individual must satisfy an educational and experience requirement, pass a Final proctored exam, and satisfy 30 hours of continuing education every two years. For additional information, refer to The American College's website at www.theamericancollege.edu.

CLU or Chartered Life Underwriter - To receive the CLU designation an individual must satisfy an educational and experience requirement, successfully pass a Final proctored exam, and satisfy 30 hours of continuing education every 2 years. For additional information, refer to The American College's website at www.theamericancollege.edu.

Item 3: Disciplinary Information

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

Item 4: Other Business Activities

James Ball is a licensed insurance agent. From time to time, he will offer clients advice or products from this activity. Clients should be aware that these services pay a commission and involve a possible conflict of interest, as commissionable products can conflict with the fiduciary duties of a registered investment adviser. Accurate Wealth Management, LLC always acts in the best interest of the client, including in the sale of commissionable products to advisory clients. Clients are in no way required to implement the plan through any representative of Accurate Wealth Management, LLC in their capacity as a licensed insurance agent.

Item 5: Additional Compensation

James Ball does not receive any economic benefit from any person, company, or organization, other than Accurate Wealth Management, LLC in exchange for providing clients advisory services through Accurate Wealth Management, LLC.

Item 6: Supervision

As a representative of Accurate Wealth Management, LLC, James Ball is supervised by Patrick Harris, the firm's Chief Compliance officer. Patrick Harris is responsible for ensuring that James Ball adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Patrick Harris is (813) 994-0984.