

*This brochure supplement provides information about Adam Leone that supplements the Accurate Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Mr. Leone 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 Adam Leone is also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).*

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

*for*

**Adam Leone**

Personal CRD Number: 7812445  
Investment Adviser Representative

Accurate Wealth Management, LLC  
2211 Ashley Oaks Circle  
Wesley Chapel, FL 33544  
[aleone@accuratewealth.com](mailto:aleone@accuratewealth.com)  
(813) 212-7109

## Item 2: Educational Background and Business Experience

**Adam Leone**

**Year of Birth:** 2001

### **Educational Background:**

- University of Tampa, Finance 2023

### **Business Background:**

- Accurate Wealth Management 9/2023 - Present  
Investment Advisor Representative
- Leone Plumbing & Heating Inc. 5/2018 - Present

## 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

### Insurance Agency Affiliations

Mr. Leone is also a licensed insurance professional. Insurance recommendations and implementations are separate and apart from Mr. Leone's role with Accurate Wealth Management. As an insurance professional, Mr. Leone receives customary commissions and other related revenues from the various insurance companies whose products are sold. Mr. Leone is not required to offer the products of any particular insurance company. Commissions generated by insurance sales do not offset regular advisory fees. This practice presents a conflict of interest in recommending certain products of the insurance companies. Clients are under no obligation to implement any recommendations made by the Advisor or by Mr. Leone.

### **Item 5: Additional Compensation**

Mr. Leone has additional business activities for which compensation is received, as described in Item 4.

### **Item 6: Supervision**

As a representative of Accurate Wealth Management, LLC, Mr. Leone is supervised by Patrick Harris, the firm's Chief Compliance Officer. Mr. Harris is responsible for ensuring that Mr. Leone 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 Mr. Harris is (917) 588-1857.