

DANIEL J. MARKESE

ACCURATE WEALTH MANAGEMENT, LLC

2211 ASHLEY OAKS CIRCLE

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Website: www.accurateadvisorygroup.com

FIRM SUPPLEMENTAL BROCHURE

ADV PART 2B

June 17, 2022

This Brochure Supplement provides information about Daniel J. Markese that supplements the Accurate Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Mr. Markese at (813) 994-0984 if you did not receive Accurate Wealth Management, LLC Brochure or if you have any questions about the contents of this supplement.

Additional information about Daniel J. Markese is available on the SEC's website at www.adviserinfo.sec.gov. You can search this site by a unique identifying number, known as a CRD number. The CRD number for Mr. Markese is 6404017.

Item 2 – Educational Background and Business Experience

Daniel Markese

Born: 1984

Education:

State University of New York of Fredonia – B.S. in Business Administration - 2006

Business Background:

AAG Capital, Inc. June 2022 to Present

Registered Representative

Accurate Wealth Mgmt. – March 2015 to May 2015 and January 2019 to Present

– Investment Adviser Representative

Accurate Advisory Group – September 2006 to Present

– Independent Insurance Consultant

TruAdvice, LLC – March 2015 to March 2020

– Investment Adviser Representative

Global Financial Private Capital, LLC – March 2015 to May 2018

– Investment Adviser Representative

Item 3 – Disciplinary Information

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that could be material to your evaluation of each supervised person providing investment advice. No information is applicable to this Item.

Item 4 – Other Business Activities

Mr. Markese is an independent insurance agent (life, annuity and Health). He spends approximately 40% of his time on this activity. Mr. Markese may recommend these services to clients. This other business activity pays Mr. Markese commissions that are separate from the fees described in the firm's ADV Part 2A. This is a conflict of interest because the commissions give Mr. Markese a financial incentive to recommend and sell clients the insurance products. However, Mr. Markese attempts to mitigate any conflicts of interest to the best of his ability by placing the client's interests ahead of his own, through his fiduciary duty and by informing clients that they are never obligated to purchase recommended insurance through him.

Item 5 – Additional Compensation

Mr. Markese does not receive any additional compensation.

Item 6 – Supervision

Mr. Markese is supervised by Patrick Harris, the firm's CCO. Mr. Harris can be reached at (866) 241-8078. Mr. Harris reviews all accounts opened by Mr. Markese.

Item 7 – Requirements for State-Registered Advisers

Arbitration or Civil, Self-Regulatory Organization or Administrative Proceedings

Mr. Markese has not been the subject of any arbitration, civil, self-regulatory organization, or administrative finding.

Bankruptcy History

Mr. Markese has not been the subject of a bankruptcy petition.