

Firm Brochure
(Part 2A of Form ADV)

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This brochure provides information about the qualifications and business practices of Prudent Investor Wealth Management, LLC. If you have any questions about the contents of this brochure, please contact us at: 804-897-3919, or by email at: dan@piwmlc.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 Prudent Investor Wealth Management, LLC is available on the SEC's website at www.adviserinfo.sec.gov

August 4, 2011

Item 2: Material Changes

Annual Update

The Material Changes section of this brochure will be updated annually when material changes occur since the previous release of the Firm Brochure.

Material Changes since the Last Update

The U.S. Securities and Exchange Commission issued a final rule in July 2010 requiring advisers to provide a Firm Brochure in narrative “plain English” format. The new final rule specifies mandatory sections and organization.

Full Brochure Available

Whenever you would like to receive a complete copy of our Firm Brochure, please contact us by telephone at: 804-897-3919 or by email at: dan@piwmlc.com.

Item 3: Table of Contents
Form ADV – Part 2A – Firm Brochure

Item 1: Cover Page

Item 2: Material Changes i

Annual Update i

Material Changes since the Last Update i

Full Brochure Available i

Item 3: Table of Contents ii

Item 4: Advisory Business 1

Firm Description 1

Types of Advisory Services 1

Client Tailored Services and Client Imposed Restrictions 2

Wrap Fee Programs 2

Client Assets under Management 2

Item 5: Fees and Compensation 2

Method of Compensation and Fee Schedule 2

Client Payment of Fees 4

Additional Client Fees Charged 4

Prepayment of Client Fees 4

External Compensation for the Sale of Securities to Clients 4

Item 6: Performance-Based Fees 4

Sharing of Capital Gains 4

Item 7: Types of Clients 5

Description 5

Account Minimums 5

Item 8: Methods of Analysis, Investment Strategies and Risk of Loss 5

Methods of Analysis and Investment Strategies 5

Investment Strategy and Method of Analysis Material Risks 5

Security Specific Material Risks 5

Item 9: Disciplinary Information	6
Criminal or Civil Actions	6
Administrative Enforcement Proceedings	6
Self Regulatory Organization Enforcement Proceedings	6
Item 10: Other Financial Industry Activities and Affiliations	7
Broker-Dealer or Representative Registration	7
Futures or Commodity Registration	7
Material Relationships Maintained by this Advisory Business and Conflicts of Interest	7
Recommendations or Selections of Other Investment Advisors and Conflicts of Interest.....	7
Item 11: Code of Ethics, Participation or Interest in Client Transactions and Personal Trading	8
Code of Ethics Description.....	8
Investment Recommendations Involving a Material Financial Interest and Conflict of Interest.....	8
Advisory Firm Purchase of Same Securities Recommended to Clients and Conflicts of Interest.....	8
Client Securities Recommendations or Trades and Concurrent Advisory Firm Securities Transactions and Conflicts of Interest	8
Item 12: Brokerage Practices	9
Factors Used to Select Broker-Dealers for Client Transactions	9
Aggregating Securities Transactions for Client Accounts	9
Item 13: Review of Accounts	9
Schedule for Periodic Review of Client Accounts or Financial Plans and Advisory Persons Involved	9
Review of Client Accounts on Non-Periodic Basis	10
Content of Client Provided Reports and Frequency.....	10
Item 14: Client Referrals and Other Compensation	10
Economic benefits Provided to the Advisory Firm from External Sources and Conflicts of Interest	10
Advisory Firm Payments for Client Referrals	10
Item 15: Custody	10
Account Statements.....	10

Item 16: Investment Discretion	10
Discretionary Authority for Trading.....	10
Item 17: Voting Client Securities.....	11
Proxy Votes	11
Item 18: Financial Information	11
Balance Sheet	11
Financial Conditions Reasonably Likely to Impair Advisory Firm’s Ability to Meet Commitments to Clients.....	11
Bankruptcy Petitions during the Past Ten Years.....	11
Item 19: Requirements for State Registered Advisors.....	12
Brochure Supplement (Part 2B of Form ADV)	12
Professional Certifications	12
Principal Executive Officers and Management Persons	12
Daniel Hill CFP®, AIF®.....	12
Other Business Activities Engaged In.....	13
Performance Based Fee Description	13
Disclosure of Material Facts Related to Arbitration or Disciplinary Actions	13
Material Relationship Maintained by this Advisory Business or Management persons with Issuers of Securities	13

Item 4: Advisory Business

Firm Description

Prudent Investor Wealth Management, LLC (“PIWM”) was founded in 2008 by Daniel Hill.

PIWM provides personalized confidential financial planning and investment management to individuals, pension and profit sharing plans, trusts, estates, charitable organizations and small businesses. Advice is provided through consultation with the client and may include: determination of financial objectives, identification of financial problems, cash flow management, tax planning, insurance review, investment management, education funding, retirement planning, and estate planning.

PIWM is a fee based financial planning and investment management firm. The firm does not sell annuities, insurance, stocks, bonds, mutual funds, limited partnerships, or other commissioned products. The firm’s members are affiliated with entities that sell insurance financial products.

Investment advice is provided with the client making the final decision on investment selection. PIWM does not act as a custodian of client assets. The client always maintains asset control.

A written evaluation of each client's initial situation is provided to the client, often in the form of a net worth statement or risk analysis. Periodic reviews are also communicated to provide reminders of the specific courses of action that need to be taken. More frequent reviews occur but are not necessarily communicated to the client unless immediate changes are recommended.

Other professionals (e.g., lawyers, accountants, insurance agents, etc.) are engaged directly by the client on an as-needed basis. Conflicts of interest will be disclosed to the client in the unlikely event they should occur.

Types of Advisory Services

PIWM provides investment supervisory services, also known as asset management services and furnishes financial planning and investment advice through consultations.

On more than an occasional basis, PIWM furnishes advice to clients on matters not involving securities, such as taxation issues and trust services that often include estate planning.

ASSET MANAGEMENT

PIWM offers discretionary direct asset management services to advisory clients. PIWM will offer clients ongoing portfolio management services through determining individual investment goals, time horizons, objectives, and risk tolerance. Investment strategies, investment selection, assets allocation, portfolio monitoring and the overall investment program will be based on the above factors. The client will authorize

PIWM discretionary authority to execute selected investment program transactions as stated within the Investment Advisory Agreement.

FINANCIAL PLANNING AND CONSULTING

If financial planning services are applicable, the client will compensate PIWM on an hourly fee basis described in detail under "Fees and Compensation" section of this brochure. Services include but are not limited to a thorough review of all applicable topics including Wills, Estate Plan/Trusts, Investments, Taxes, and Insurance. If conflict of interest exists between the interests of the investment advisor and the interests of the client, the client is under no obligation to act upon the investment advisor's recommendation. If the client elects to act on any of the recommendations, the client is under no obligation to effect the transaction through PIWM. Financial plans will be completed and delivered inside of 6 months. Clients may terminate advisory services with 30 days written notice.

Client Tailored Services and Client Imposed Restrictions

The goals and objectives for each client are documented in our client files. Investment strategies are created that reflect the stated goals and objective. Clients may impose restrictions on investing in certain securities or types of securities.

Agreements may not be assigned without written client consent.

Wrap Fee Programs

PIWM does not participate in wrap fee programs.

Client Assets under Management

As of December 31, 2010 PIWM has no direct client assets under management. PIWM has utilized the services of third party money managers to manage its clients' assets.

Item 5: Fees and Compensation

Method of Compensation and Fee Schedule

PIWM bases its fees on a percentage of assets under management, hourly charges, fixed fees and solicitor fees from third party money managers.

ASSET MANAGEMENT

PIWM offers discretionary direct asset management services to advisory clients. PIWM will offer clients ongoing portfolio management services through determining individual investment goals, time horizons, objectives, and risk tolerance. Investment strategies, investment selection, assets allocation, portfolio monitoring and the overall investment program will be based on the above factors.

Fees for these services will be based on a percentage of Assets Under Management as follows:

Assets Under Managements	Annual Fee	Quarterly Fee
Up to \$250,000	2.00%	.50%
\$250,001 - \$500,000	1.75%	.43%
\$500,001 - \$1,000,000	1.50%	.37%
\$1,000,001 - \$2,500,000	1.00%	.25%
\$2,500,001 - \$5,000,000	0.75%	.18%
Over \$5,000,000	0.50%	.125%

The annual Fee may be negotiable. Accounts within the same household may be combined for a reduced fee. Fees are billed quarterly in arrears based on the amount of assets managed as of the close of business on the last business day of each quarter. Quarterly advisory fees deducted from the clients' account by the custodian will be reflected in a provided fee invoice as fees are withdrawn. Lower fees for comparable services may be available from other sources. Clients may terminate their account within five business days of signing the Investment Advisory Agreement for a full refund. Clients may terminate advisory services with 30 days written notice. PIWM will be entitled to a pro rata fee for the days service was provided in the final quarter. Client shall be given thirty (30) days prior written notice of any increase in fees.

FINANCIAL PLANNING and CONSULTING

FIXED FEES

Financial Planning Services are offered based on a negotiable fixed fee with a maximum fee of \$2,500 based on complexity and unique client needs. Prior to the planning process the client will be provided an estimated plan fee. Services include but are not limited to a thorough review of all applicable topics including Wills, Estate Plan/Trusts, Investments, Taxes, and Insurance. The payments are received in two installments: half at the commencement of the planning process, balance of the final payment is due upon delivery of completed plan. Client may cancel within five (5) days of signing Agreement for a full refund. If the client cancels after five (5) days, any unearned fees will be refunded to the client.

HOURLY FEES

Financial Planning Services are offered based on a non-negotiable hourly fee of \$200 per hour. Prior to the planning process the client will be provided an estimated plan fee. Services include but are not limited to a thorough review of all applicable topics including Wills, Estate Plan/Trusts, Investments, Taxes, and Insurance. The payments are received in two installments: half at the commencement of the planning process, balance of the final payment is due upon delivery of completed plan. Client may cancel within five (5) days of signing Agreement for a full refund. If the client cancels after five (5) days, any unearned fees will be refunded to the client.

Client Payment of Fees

Investment management fees are billed quarterly, in arrears, meaning that we invoice you after the three-month billing period has ended. Payment in full is expected upon invoice presentation. Fees are usually deducted from a designated client account to facilitate billing. The client must consent in advance to direct debiting of their investment account.

Fees for financial plans are billed 50% in advance, with the balance due upon delivery of the financial plan.

Additional Client Fees Charged

Custodians may charge transaction fees on purchases or sales of certain mutual funds and exchange-traded funds. These transaction charges are usually small and incidental to the purchase or sale of a security. The selection of the security is more important than the nominal fee that the custodian charges to buy or sell the security.

PIWM, in its sole discretion, may waive its minimum fee and/or charge a lesser investment advisory fee based upon certain criteria (e.g., historical relationship, type of assets, anticipated future earning capacity, anticipated future additional assets, dollar amounts of assets to be managed, related accounts, account composition, negotiations with clients, etc.).

Prepayment of Client Fees

Financial Plans are billed 50% in advance. Client may cancel within five business days of signing the Investment Advisory Agreement for a full refund. If cancellation occurs after five business days, client will be entitled to a pro-rata refund based on work completed.

External Compensation for the Sale of Securities to Clients

PIWM does not receive any external compensation for the sale of securities to clients, nor do any of the investment advisor representatives of PIWM.

Item 6: Performance-Based Fees

Sharing of Capital Gains

Fees are not based on a share of the capital gains or capital appreciation of managed securities.

PIWM does not use a performance-based fee structure because of the potential conflict of interest. Performance-based compensation may create an incentive for the adviser to recommend an investment that may carry a higher degree of risk to the client.

Item 7: Types of Clients

Description

PIWM generally provides investment advice to individuals, pension and profit sharing plans, trusts, estates, or charitable organizations, corporations or business entities.

Client relationships vary in scope and length of service.

Account Minimums

PIWM does not require a minimum to open an account.

Item 8: Methods of Analysis, Investment Strategies and Risk of Loss

Methods of Analysis and Investment Strategies

Security analysis methods may include fundamental analysis, technical analysis, and cyclical analysis. Investing in securities involves risk of loss that clients should be prepared to bear.

The main sources of information include financial newspapers and magazines, research materials prepared by others, corporate rating services, annual reports, prospectuses, and filings with the Securities and Exchange Commission.

Investment Strategy and Method of Analysis Material Risks

The investment strategy for a specific client is based upon the objectives stated by the client during consultations. The client may change these objectives at any time. Each client executes an Investment Policy Statement or Risk Tolerance that documents their objectives and their desired investment strategy.

Other strategies may include long-term purchases, short-term purchases, trading, and option writing (including covered options, uncovered options or spreading strategies).

Security Specific Material Risks

All investment programs have certain risks that are borne by the investor. Our investment approach constantly keeps the risk of loss in mind. Investors face the following investment risks:

- *Interest-rate Risk:* Fluctuations in interest rates may cause investment prices to fluctuate. For example, when interest rates rise, yields on existing bonds become less attractive, causing their market values to decline.
- *Market Risk:* The price of a security, bond, or mutual fund may drop in reaction to tangible and intangible events and conditions. This type of risk is caused by external factors independent of a security's particular underlying circumstances. For example, political, economic and social conditions may trigger market events.

- *Inflation Risk:* When any type of inflation is present, a dollar today will buy more than a dollar next year, because purchasing power is eroding at the rate of inflation.
- *Currency Risk:* Overseas investments are subject to fluctuations in the value of the dollar against the currency of the investment's originating country. This is also referred to as exchange rate risk.
- *Reinvestment Risk:* This is the risk that future proceeds from investments may have to be reinvested at a potentially lower rate of return (i.e. interest rate). This primarily relates to fixed income securities.
- *Business Risk:* These risks are associated with a particular industry or a particular company within an industry. For example, oil-drilling companies depend on finding oil and then refining it, a lengthy process, before they can generate a profit. They carry a higher risk of profitability than an electric company which generates its income from a steady stream of customers who buy electricity no matter what the economic environment is like.
- *Liquidity Risk:* Liquidity is the ability to readily convert an investment into cash. Generally, assets are more liquid if many traders are interested in a standardized product. For example, Treasury Bills are highly liquid, while real estate properties are not.
- *Financial Risk:* Excessive borrowing to finance a business' operations increases the risk of profitability, because the company must meet the terms of its obligations in good times and bad. During periods of financial stress, the inability to meet loan obligations may result in bankruptcy and/or a declining market value.

Item 9: Disciplinary Information

Criminal or Civil Actions

The firm and its management have not been involved in any criminal or civil action.

Administrative Enforcement Proceedings

The firm and its management have not been involved in administrative enforcement proceedings.

Self Regulatory Organization Enforcement Proceedings

The firm and its management have not been involved in legal or disciplinary events related to past or present investment clients.

Item 10: Other Financial Industry Activities and Affiliations

Broker-Dealer or Representative Registration

Neither PIWM nor any of its employees are registered representatives of a broker-dealer.

Futures or Commodity Registration

Neither PIWM nor its employees are registered or has an application pending to register as a futures commission merchant, commodity pool operator, or a commodity trading advisor.

Material Relationships Maintained by this Advisory Business and Conflicts of Interest

Managing Member Daniel Hill's principal business is as an insurance agent. Greater than 50% of Mr. Hill's time is spent in this practice. From time to time, he will offer clients advice or products from those activities.

These practices represent potential conflicts of interest because it gives Mr. Hill an incentive to recommend products based on the commission amount received. This conflict is mitigated by the fact that clients are not required to purchase any products. Clients have the option to purchase these products through another insurance agent of their choosing.

Recommendations or Selections of Other Investment Advisors and Conflicts of Interest

PIWM may at times utilize the services of Third Party Money Managers to manage client accounts. Prior to utilizing any third party money manager, PIWM will enter into a written agreement with each third party money manager. This agreement will describe the activities of PIWM and the fee they receive. This situation creates a conflict of interest. However, when referring clients to a third party money manager, the client's best interest will be the main determining factor of PIWM. These fees do not include brokerage fees that may be assessed by the custodial broker dealer. Fees for these services will be based on a percentage of assets under management not to exceed any limit imposed by any regulatory agency. The final fee schedule will be attached to Exhibit D in PIWM's Investment Advisory Agreement.

This arrangement will be disclosed to the client in a disclosure document outlining the relationship between PIWM and the Third Party Money Manager. This agreement will include the name of the assisting investment advisor representative, the name of the third party money manager, the nature of the relationship and affiliation if any, a statement of compensation and amount, the terms of the compensation arrangement, and any additional fee(s) charged to clients above the normal fee of the third party money manager as a result of retaining the third party money manager through PIWM.

PIWM does not charge additional management fees for Third Party managed account services. Client's signature is required to confirm consent for services within Third Party Investment Agreement. Client will initial PIWM's Investment Advisory Agreement to acknowledge receipt of Third Party fee Schedule and required documents including ADV2 disclosures.

Item 11: Code of Ethics, Participation or Interest in Client Transactions and Personal Trading

Code of Ethics Description

The employees of PIWM have committed to a Code of Ethics. The purpose of our Code of Ethics is to ensure that when employees buy or sell securities for their personal account, they do not create actual or potential conflict with our clients. We do not allow any employees to use non-public material information for their personal profit or to use internal research for their personal benefit in conflict with the benefit to our clients.

The firm will provide a copy of the Code of Ethics to any client or prospective client upon request.

Investment Recommendations Involving a Material Financial Interest and Conflict of Interest

PIWM and its employees do not recommend to clients securities in which we have a material financial interest.

Advisory Firm Purchase of Same Securities Recommended to Clients and Conflicts of Interest

PIWM and its employees may buy or sell securities that are also held by clients. In order to avoid potential conflicts of interest such as front running of client trades, employees are required to disclose all reportable securities transactions as well as provide PIWM with copies of their brokerage statements.

The Chief Compliance Officer of PIWM is Daniel Hill. He reviews all employee trades each quarter. The personal trading reviews ensure that the personal trading of employees does not affect the markets and that clients of the firm receive preferential treatment. Since most employee trades are in products such as mutual funds, government securities, bonds or are small in size, they do not impact the securities markets.

Client Securities Recommendations or Trades and Concurrent Advisory Firm Securities Transactions and Conflicts of Interest

PIWM does not maintain a firm proprietary trading account and does not have a material financial interest in any securities being recommended and therefore no conflicts of interest exist.

Item 12: Brokerage Practices

Factors Used to Select Broker-Dealers for Client Transactions

PIWM may recommend the use of a particular broker-dealer or may utilize a broker-dealer of the client's choosing. PIWM will select appropriate brokers based on a number of factors including but not limited to their relatively low transaction fees and reporting ability. PIWM relies on its broker to provide its execution services at the best prices available. Lower fees for comparable services may be available from other sources. Clients pay for any and all custodial fees in addition to the advisory fee charged by PIWM.

- *Directed Brokerage*
In circumstances where a client directs PIWM to use a certain broker-dealer, PIWM still has a fiduciary duty to its clients. The following may apply with Directed Brokerage: PIWM's inability to negotiate commissions, to obtain volume discounts, there may be a disparity in commission charges among clients, and potential conflicts of interests arising from brokerage firm referrals.
- *Best Execution*
Investment advisors who manage or supervise client portfolios on a discretionary basis have a fiduciary obligation of best execution. PIWM reviews the execution of trades at each custodian each quarter.
- *Soft Dollar Arrangements*
PIWM utilizes the services of custodial broker dealers. Economic benefits are received by PIWM which would not be received if PIWM did not give investment advice to clients. These benefits include: A dedicated trading desk, a dedicated service group and an account services manager dedicated to PIWM's accounts, ability to conduct "block" client trades, electronic download of trades, balances and positions, duplicate and batched client statements, and the ability to have advisory fees directly deducted from client accounts.

Aggregating Securities Transactions for Client Accounts

PIWM is authorized in its discretion to aggregate purchases and sales and other transactions made for the account with purchases and sales and transactions in the same securities for other Clients of PIWM. All clients participating in the aggregated order shall receive an average share price with all other transaction costs shared on a pro-rated basis.

Item 13: Review of Accounts

Schedule for Periodic Review of Client Accounts or Financial Plans and Advisory Persons Involved

Account reviews are performed quarterly by Daniel Hill, Chief Compliance Officer. Account reviews are performed more frequently when market conditions dictate. Financial Plans are considered complete when recommendations are delivered to the

client. Clients may request PIWM to review their current financial situation at any time and pay the fees listed in Item 5 for financial planning fees.

Review of Client Accounts on Non-Periodic Basis

Other conditions that may trigger a review of clients' accounts are changes in the tax laws, new investment information, and changes in a client's own situation.

Content of Client Provided Reports and Frequency

Clients receive account statements no less than quarterly for managed accounts. Account reports are issued by the Advisor's custodian. Client receives confirmations of each transaction in account from Custodian and an additional statement during any month in which a transaction occurs. PIWM does not provide additional reports to clients.

Item 14: Client Referrals and Other Compensation

Economic benefits Provided to the Advisory Firm from External Sources and Conflicts of Interest

PIWM does not receive any economic benefits from external sources.

Advisory Firm Payments for Client Referrals

PIWM does not compensate for client referrals.

Item 15: Custody

Account Statements

All assets are held at qualified custodians, which means the custodians provide account statements directly to clients at their address of record at least quarterly. Clients are urged to compare the account statements received directly from their custodians to the performance report statements prepared by PIWM.

Item 16: Investment Discretion

Discretionary Authority for Trading

PIWM accepts discretionary authority to manage securities accounts on behalf of clients. The client will grant this discretion in the advisory agreement and/or executing a limited power of attorney document. PIWM has the authority to determine, without obtaining specific client consent, the securities to be bought or sold, and the amount of the securities to be bought or sold. However, PIWM consults with the client prior to each trade to obtain concurrence if a blanket trading authorization has not been given.

The client approves the custodian to be used and the commission rates paid to the custodian. PIWM does not receive any portion of the transaction fees or commissions paid by the client to the custodian on certain trades.

Item 17: Voting Client Securities

Proxy Votes

PIWM does not vote proxies on securities. Clients are expected to vote their own proxies. The client will receive their proxies directly from the custodian of their account or from a transfer agent.

When assistance on voting proxies is requested, PIWM will provide recommendations to the client. If a conflict of interest exists, it will be disclosed to the client.

Item 18: Financial Information

Balance Sheet

A balance sheet is not required to be provided because PIWM does not serve as a custodian for client funds or securities and PIWM does not require prepayment of fees of more than \$500 per client and six months or more in advance.

Financial Conditions Reasonably Likely to Impair Advisory Firm's Ability to Meet Commitments to Clients

PIWM has no condition that is reasonably likely to impair our ability to meet contractual commitments to our clients.

Bankruptcy Petitions during the Past Ten Years

Neither PIWM nor its management has had any bankruptcy petitions in the last ten years.

Item 19: Requirements for State Registered Advisors

Brochure Supplement (Part 2B of Form ADV) Supervised Person Brochure

Professional Certifications

Employees have earned certifications and credentials that are required to be explained in further detail.

Certified Financial Planner (CFP): Certified Financial Planners are licensed by the CFP Board to use the CFP mark. CFP certification requirements:

- Bachelor's degree from an accredited college or university.
- Completion of the financial planning education requirements set by the CFP Board (www.cfp.net).
- Successful completion of the 10-hour CFP® Certification Exam.
- Three-year qualifying full-time work experience.
- Successfully pass the Candidate Fitness Standards and background check.

Accredited Investment Fiduciary (AIF): Accredited Investment Fiduciaries are licensed by the Center for Fiduciary Studies, LLC to use the AIF mark. AIF certification requirements:

- Complete training curriculum
 - Pass the 60 questions AIF exam with 75% correct answers
 - Sign and agree to abide by a code of ethics
 - Complete six hours of continuing professional education, four of which are FI360 Training CE
 - Maintain current contact information in FI360's designee database
 - Submit yearly renewal application with \$325 in annual dues
-

Principal Executive Officers and Management Persons

Daniel Hill CFP®, AIF®

Educational Background:

- Date of birth: 07/26/1956
- College for Financial Planning; CFP®; 2002
- Accredited Investment Fiduciary Course; AIF® - 2007

- College of William and Mary; Bachelor of Business Administration-Management; 1978

Business Experience:

- Prudent Investor Wealth Management, LLC; Managing Member/IAR; 12/2008 - Present
- D.R. Hill & Associates, Inc.; President/Insurance Agent; 04/2006 - Present
- Centaurus Financial, Inc.; IAR/Registered Representative; 04/2006 – 12/2008
- Suntrust Securities, Inc.; Insurance Specialist; 08/2004 – 03/2006
- John Hancock; IAR/Registered Representative; 11/1998 - 08/2004

Other Business Activities Engaged In

Daniel Hill has a financial industry affiliated business as an insurance agent. From time to time, he offers clients advice or products from those activities. Clients are not required to purchase any products.

Performance Based Fee Description

No Performance Based Fees

Disclosure of Material Facts Related to Arbitration or Disciplinary Actions

None to report

Material Relationship Maintained by this Advisory Business or Management persons with Issuers of Securities

None to report