



MYLES

WEALTH MANAGEMENT

Grow, Preserve, and Distribute Your Wealth.

Myles Wealth Management, LLC

59 North Main Street

Florida, NY 10921

845-651-3070

www.myleswealthmanagement.com

Dated March 11, 2024

Form ADV Part 2B – Brochure Supplement

For

Myles V. Mezzetti, President

CRD# 842596

Luis A. Neely, Investment Advisor Representative & Chief Compliance Office CRD#5445868

Lori Mezzetti, Investment Advisor Representative

CRD # 2282578

Linda Tamberino, Investment Advisor Representative

CRD# 4579578

This brochure supplement provides information about the individual(s) listed above that supplements the Myles Wealth Management, LLC (“MYLES”) brochure. A copy of that brochure precedes this supplement. Please contact Luis Neely if the MYLES brochure is not included with this supplement or if you have any questions about the contents of this supplement.

Additional information about the individual(s) listed above is available on the SEC’s website at www.adviserinfo.sec.gov

Item 2: Educational Background and Business Experience

Myles Vincent Mezzetti

Born: 1942

Business Experience

- 12/2013 – Present, Myles Wealth Management, LLC, President
 - 09/1987 – Present, Myles Financial Services, Owner
 - 1990 – Present, Mezzetti Enterprises, LLC, Owner
 - 12/2013 – 10/2017, SII, Registered Representative
 - 10/2011 – 12/2013, AXA Advisors, LLC, Registered Representative
 - 04/1994 – 10/2011, Cadaret, Grant & Co., Inc., Registered Representative
-

Luis A. Neely, RICP®

Born: 1977

Business Experience

- 10/2016 – Present, Myles Wealth Management, LLC, Investment Advisor Representative, CCO
 - 12/2018 – Present, Neely Consulting Inc, President
 - 10/2016 – Present, Mezzetti Enterprises, LLC, Insurance Sales
 - 2014 – 2016, Mezzetti Enterprises, LLC, Insurance Sales
-

Lori Mezzetti

Born: 1970

Educational Background

- 1991 – Bachelor of Science, Finance, Lemoyne College, Syracuse, New York

Business Experience

- 12/2013 – Present, Myles Wealth Management, LLC, Investment Advisor Representative
 - 2008 – Present, Mezzetti Enterprises, LLC, Insurance Sales
 - 12/2013 – 04/2017, SII, Registered Representative
 - 09/2006 – 04/2017, Myles Financial Services, Agent
-

Linda Tamberino

Born: 1942

Business Experience

- 04/2015 – Present, Myles Wealth Management, LLC, President
 - 01/2011 – Present, Mezzetti Enterprises, LLC, Insurance Sales
 - 12/2013 – 10/2017, SII, Registered Representative
 - 02/2013 – 12/2013, AXA Advisors, LLC, Registered Representative
 - 01/2012 – 02/2013, AXA Advisors, LLC, NRF
 - 03/2010 – 02/2013, Myles Financial Services, Associate
-

Professional Designations

Retirement Income Certified Professional (RICP®): The RICP® designation teaches advisers techniques and best practices used to create sustainable streams of retirement income. The education covers retirement income planning, maximizing Social Security and other income sources, minimizing risks to the plan, and managing portfolios during the asset distribution phase. The designation includes three required, college-level courses that represent a total average study time of more than 150 hours. RICP® designees must meet experience, continuing education and ethics requirements. The credential is awarded by The American College, a non-profit educator with an 85-year heritage and the highest form of academic accreditation.

Item 3: Disciplinary Information

No management person at Myles Wealth Management, LLC has ever been involved in an arbitration claim of any kind or been found liable in a civil, self-regulatory organization, or administrative proceeding.

Item 4: Other Business Activities

All MYLES Investment Advisor Representatives are representatives of Mezzetti Enterprises, LLC. They are licensed to sell insurance and fixed annuity products with Mezzetti Enterprises, LLC. for customary commission compensation. No client is obligated to use any person or broker or insurance company. The purchase of insurance products is not part of the investment advisory services of MYLES. A potential conflict of interest exists. This activity accounts for approximately 5% of their time.

Mr. Mezzetti is also the owner of Myles Financial Services. This activity accounts for approximately 5 hours a month.

Mr. Neely is the President of Neely Consulting Inc. This activity accounts for approximately 1 hour a month.

Item 5: Additional Compensation

Mr. Mezzetti, Mr. Neely, Ms. Mezzetti and Ms. Tamberino do not receive any economic benefit from any person, company, or organization, in exchange for providing clients advisory services through MYLES.

Item 6: Supervision

Luis Neely, Chief Compliance Officer of MYLES, is responsible for supervision. He may be contacted at the phone number on this brochure supplement.