

**Item 1: Cover Page  
Part 2B of Form ADV: Brochure Supplement  
January 2024**

**Matthew M. Glatt**

**Nesso Wealth, LLC.**

**409 Canal St.**

**Milldale, CT. 06467**

**{860} 406-8920**

**[www.nessogroup.com](http://www.nessogroup.com)**

**Firm Contact:**

**William C. Brand  
Chief Compliance Officer**

This brochure supplement provides information about Mr. Glatt that supplements our brochure. You should have received a copy of that brochure. Please contact Mr. Brand if you did not receive NewEdge Advisors, LLC doing business as Nesso Wealth, LLC's brochure or if you have any questions about the contents of this supplement. Additional information about Mr. Glatt is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching CRD #4286863

## Item 2: Educational Background & Business Experience

**Name:** Matthew M. Glatt

**Year of Birth:**  
1967

**Educational Background:**

1989: Bryant University; Bachelor's degree in Accounting

**Business Background:**

01/2024 – Present	NewEdge Advisors, LLC; Investment Advisor Representative
01/2022 – Present	Nesso Accounting and Tax; CEO, CPA
01/2022 – Present	Nesso Group; CEO, Wealth Advisor
01/2016 – 01/2024	CWM, LLC; Investment Advisor Representative
04/2011 – 01/2022	FLP Financial; CEO, Wealth Advisor
04/2011 - 01/2022	FLP Accounting and Tax; CEO, CPA
01/2013 – 12/2015	Infinex Investments; Registered Representative
01/2013 – 12/2015	Infinex Investments; Investment Advisor Representative

**Exams, Licenses & Other Professional Designations:**

2000: Series 66 Exam  
2000: Series 7 Exam  
2003: Series 53 Exam  
2001: Series 24 Exam  
2000: Licensed Insurance Agent /CT Health and Life  
1993: CPA  
2017: Certified Financial Planner  
2023: Accredited Investment Fiduciary

**Accredited Investment Fiduciary® (AIF®)** is a designation obtained through the Center for Fiduciary Studies. This designation represents a thorough knowledge of and ability to apply fiduciary practices. Prerequisites for the AIF® include a point-based threshold on a combination of education, relevant industry experience and/or professional development. Once the prerequisites are met, one must successfully complete the AIF course and pass a proctored exam. To maintain this designation, the designee must ascribe to a professional code of ethics, maintain current contact information, complete 6 hours of continuing education each year, and pay annual dues.

**CPA:** Each state has different requirements for CPA certification. Most require individuals to obtain a bachelor's degree in accounting or a related field prior to sitting for the Universal CPA exam. Most states also require an additional year of accounting-focused education to become licensed. This is referred to as the "150-Hour Rule," which means the individual needs five years of full-time equivalent study. Some states may also have a residency or citizenship requirement.

Each state or jurisdiction has its own board of accountancy or equivalent governing body that determines eligibility and issues licenses. Completing 1 to 2 years of relevant work experience may also be necessary. After passing the Universal CPA exam and completing all licensing requirements, certified public accountants must complete a certain number of continuing education hours each year. In many

states and jurisdictions, this is approximately 40 hours annually.

**The CFP®** certification is obtained by completing an advanced college-level course of study addressing the financial planning subject areas that the CFP® Board's studies have determined as necessary for the competent and professional delivery of financial planning services, a comprehensive certification exam (administered in 10 hours over a 2-day period) and agreeing to be bound by the CFP® board's standard of professional conduct. As a prerequisite, the individual must have a Bachelor's degree from a regionally accredited United States college or university (or foreign university equivalent) and have at least 3 years of full-time financial planning experience (or equivalent measured at 2,000 hours per year). This designation requires 30 hours of continuing education every 2 years and renewing an agreement to be bound by the *Standards of Professional Conduct*.

### Item 3: Disciplinary Information<sup>1</sup>

There are no legal or disciplinary events material to the evaluation of Mr. Glatt.

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<sup>1</sup>Note: Our firm may, under certain circumstances, rebut the presumption that a disciplinary event is material. If an event is immaterial, we are not required to disclose it. When we review a legal or disciplinary event involving the advisor to determine whether it is appropriate to rebut the presumption of materiality, we consider all of the following factors: (1) the proximity of advisor to the advisory function; (2) the nature of the infraction that led to the disciplinary event; (3) the severity of the disciplinary sanction; and (4) the time elapsed since the date of the disciplinary event. If we conclude that the materiality presumption has been overcome, we prepare and maintain a file memorandum of our determination in our records. We follow SEC rule 204-2(a)(14)(iii) and similar state rules.

## Item 4: Other Business Activities

NewEdge Advisors, LLC; DBA Nesso Wealth, LLC. {RIA} – Investment Related- Investment Advisor Representative – Start: 01/2024 – at reported business location.

Nesso Accounting and Tax, LLC; Not investment related, but may refer or recommend investment advisory services – Tax return Preparation and bookkeeping services – Staff Accountant – Start: 06/2022 – 10% – 20% of my time during trading hours is devoted to this activity – Preparing individual and business tax returns during tax season.

Nesso Insurance: Life/Health Insurance Agent – Not investment related activity – Life and health sales – Insurance Agent – Less than 5% of my time is devoted to this activity during trading hours.

Nesso Group; Insurance Licensed Representative – 409 Canal Street, Milldale, CT 06467 – not investment related – Review insurance needs with clients and facilitate quotes, application and executed documents for client’s signature – 2 hours per month re devoted to this activity.

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

Mr. Glatt does not receive any other economic benefit for providing advisory services in addition to advisory fees.

### **Item 6: Supervision**

Mr. Brand supervises and monitors Mr. Glatt's activities on a regular basis to ensure compliance with our firm's Code of Ethics. Please contact Mr. Brand if you have any questions about Mr. Glatt's brochure supplement at 877-832-6632.