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

Gary Leo Martin

Nesso Wealth, LLC. 409 Canal St. Milldale, CT. 06467 {860} 406-8927

www.nessogroup.com

<u>Firm Contact:</u> William C. Brand Chief Compliance Officer

This brochure supplement provides information about Mr. Martin 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 Group, LLC.'s brochure or if you have any questions about the contents of this supplement. Additional information about Mr. Martin is available on the SEC's website at <u>www.adviserinfo.sec.gov</u> by searching CRD #4403805

Item 2: Educational Background & Business Experience

Name: Gary L. Martin

Year of Birth: 1976

Educational Background: 1998: Bryan University; Bachelor's degree in Accounting

Business Background:

01/2024 – Present 05/2004 – Present NewEdge Advisors, LLC; Investment Advisor Representative Nesso Group; CPA/Wealth Advisor

Exams, Licenses & Other Professional Designations:

2014: Series 66 Exam 2014: Series 7 Exam 2016: SIE

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.

Item 3: Disciplinary Information¹

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

¹Note: 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 group – 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 – 120 Hours per month is spent on this activity during trading hours – Provide Accounting and tax services to the general public.

Nesso Insurance, LLC – Not investment Related – Investor – 409 Canal Street, Milldale CT 06467 – P and C Insurance – Partner – Start: 01/2022 – Zero hours per month are devoted to this activity – Provide insurance services to the general public.

Kafei LLC: Not investment Related – 210 Old Towne Rd Cheshire CT 06410 – Retail Café – Partner – Start: 01/2022 – 20 Hours per month are spent on the activity, zero hours during trading hours – Retail Espresso Café.

Item 5: Additional Compensation

Please refer to the firm's ADV for further information.

Item 6: Supervision

Mr. Brand supervises and monitors Mr. Martin'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. Martin's brochure supplement at 877-832-6632.