

This brochure supplement provides information about Investment Adviser Representative, Jennifer A. McKinnon (CRD No. 2213066), that supplements the firm brochure of The Prosperity Consulting Group, LLC d/b/a Prosperity - An EisnerAmper Company (IARD No. 133777) ("Prosperity" or the "Firm"). You should have received a copy of that Brochure. Please contact Donna C. Gestl (contact information below), if you did not receive the Prosperity Brochure or if you have any questions about the contents of this supplement.

Additional information about Investment Adviser Representative, Jennifer A. McKinnon (CRD No. 2213066) can be found on the Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov. That website can be searched by using the investment adviser representative's CRD number (shown above).

BROCHURE SUPPLEMENT

for

Jennifer Allyn McKinnon

1500 Sunday Drive, Suite 300

Raleigh, NC 27607



PROSPERITY

An EisnerAmper Company

Prosperity - An EisnerAmper Company

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For Firm Information Contact:

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August 6, 2024

EDUCATIONAL BACKGROUND & BUSINESS EXPERIENCE (Item 2)

Prosperity requirements for Investment Adviser Representative Employment

Prosperity requires that employees who provide discretionary security selection on behalf of the Firm have at least, a 4-year college degree, 2 years relevant work experience in the securities industry and have taken and passed the appropriate state advisory exam. Investment Adviser Representatives must have work experience that demonstrates their aptitude for financial planning and investment management. Investment Adviser Representatives should have further coursework demonstrating knowledge of financial planning and tax planning. Examples of acceptable coursework include: an MBA, a CFP®, a CFA®, a ChFC, JD, or CPA. If an Investment Adviser Representative does not meet the above requirements, he or she will be required to work jointly with a senior advisor until such requirements are met.

Investment Adviser Representative's Information

Jennifer A. McKinnon, CFP®

Year of Birth: 1965

Educational Background

Bachelor of Arts, International Economics and Business, Westminster College, New Wilmington, PA 1987

Bachelor of Arts, Spanish, Westminster College, New Wilmington, PA 1987

Professional Designation(s)

Certified Financial Planner™, CFP®

I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and I may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at www.CFP.net.

CFP® professionals have met CFP Board's standards for education, examination, experience, and ethics. To become a CFP® professional, an individual must fulfill the following requirements:

Education – Earn a bachelor's degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials. CFP Board implemented the bachelor's degree or higher requirement in 2007 and the financial planning development capstone course requirement in March 2012. Therefore, a CFP® professional who first became certified before those dates may not have earned a bachelor's or higher degree or completed a financial planning development capstone course;

Examination – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual's ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations;

Experience – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements; and

Ethics – Satisfy the Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement and agree to be bound by CFP Board's Code of Ethics and Standards of Conduct ("Code and Standards"), which sets forth the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements to remain certified and maintain the right to continue to use the CFP Board Certification Marks:

Ethics – Commit to complying with CFP Board’s Code and Standards. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional’s services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.

Continuing Education – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

Business Experience

<i>Registered Representative</i> DAI Securities, LLC, Raleigh, NC	<i>08/2024 to Present</i>
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<i>Investment Adviser Representative</i> Prosperity - An EisnerAmper Company, Raleigh, NC	<i>08/2024 to Present</i>
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<i>Registered Representative</i> Avantax Investment Services, Inc., Raleigh, NC	<i>10/2019 to 08/2024</i>
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<i>Investment Adviser Representative</i> Avantax Advisory Services, Raleigh, NC	<i>10/2019 to 08/2024</i>
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<i>Insurance Agent</i> Avantax Insurance Services, Raleigh, NC	<i>10/2019 to 08/2024</i>
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<i>Registered Representative</i> HPG Wealthcare Advisors, LLC	<i>10/2011 to 08/2024</i>
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<i>BMS Financial Advisor</i> 1st Global Capital Corp., Raleigh, NC	<i>07/2008 to 10/2019</i>
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<i>Investment Adviser Representative</i> 1st Global Advisors, Inc., Raleigh, NC	<i>07/2008 to 10/2019</i>
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<i>Insurance Agent</i> 1st Global Insurance Services, Inc., Raleigh, NC	<i>07/2008 to 10/2019</i>
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DISCIPLINARY INFORMATION (Item 3)

Criminal or Civil Actions
None.

Administrative Actions or Proceedings
None.

Self-Regulatory Organization (SRO) Proceedings
None.

Professional Standards Violations
None.

OTHER BUSINESS ACTIVITIES (Item 4)

Investment Related

Jennifer A. McKinnon is also a licensed insurance agent who transacts insurance product sales through various insurance vendors. Ms. McKinnon will earn separate, yet customary compensation for insurance product sales. Ms. McKinnon positions insurance products, as appropriate in the context of full financial planning.

In her dual roles as investment advisor representative, insurance agent and securities salesperson (as referenced in Items 5 and 10 of our Brochure), Ms. McKinnon is faced with conflicts of interest whereby the receipt of commissions for selling insurance or securities products gives her an incentive to recommend insurance or investment products based on compensation received, rather than the client's needs. We address this conflict of interest by, among other things, requiring all representatives who are licensed to offer insurance products to our clients to assure that the recommendation to purchase insurance is in the client's best interest. These products may be available through other channels and as a client you are not obligated to purchase products recommended by our representatives. *(Please see Item 10, Financial Industry Affiliations of our Brochure for additional details)*

Non-Investment Related

None.

ADDITIONAL COMPENSATION (Item 5)

Ms. McKinnon earns additional compensation as a result of her dual financial industry activities and affiliations. *(Please see Item 10, Financial Industry Affiliations of our Brochure for additional details)*

SUPERVISION (Item 6)

Donna C. Gestl, another investment adviser representative of the Firm, supervises Ms. McKinnon. The Firm administers supervision through application of its written policies and procedures. If you have questions regarding the supervisory procedures of the firm, you may contact Donna C. Gestl, Chief Compliance Officer by phone at 410-363-7211 or by email to donna.gestl@prosperityea.com.