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United Financial Planning Group, LLC

Form ADV Part 2B Brochure Supplement for Gerard Barrasso

Address:	350 Motor Parkway Suite 300 Hauppauge, NY 11788
Phone:	(631) 234-0871
Email:	gbarrasso@unitedfpg.com
Website:	www.unitedfpg.com

This brochure supplement provides information about Gerard Barrasso that supplements the United Financial Planning Group, LLC brochure. You should have received a copy of that brochure. Please contact Gerard Barrasso using the contact information listed above if you did not receive United Financial Planning Group, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Gerard Barrasso is available on the SEC's website at www.adviserinfo.sec.gov and by searching for CRD# 149843.

Item 2: Educational Background & Business Experience

Name:	Gerard Barrasso
Year of Birth:	1969
Education:	Certificate, Financial Planning Fordham University 2008 MBA St. John's University, The Peter Tobin College of Business 1995 BBA Hofstra University 1991
Business Background:	United Financial Planning Group, LLC Founder & President Jan 2008 – Present
Professional Designations:	Certified Financial Planner ® ("CFP®")

The CFP® certification is a financial planning credential awarded by the Certified Financial Planner Board of Standards Inc. In order to earn and maintain the CFP® designation, individuals must meet the initial certification components of (i) education relevant to the professional, competent, and ethical provision of financial planning services, (ii) pass the certification examination, (iii) attain three years of professional experience, (iv) pass a background check and disclose certain occurrences, (v) complete thirty hours of continuing education every two years, (vi) submit a certification application every two years, and (vii) pay an annual certification fee. Further information about the qualifications and standards required of a CFP may be found by visiting the CFP Board of Standard's website at http://www.cfp.net/.

Certified Public Accountant ("CPA")

The requirements to become a CPA vary by state/jurisdiction, but generally require an undergraduate degree, 150 semester hours of curriculum and the passage of an exam with sections including (1) auditing and attestation, (2) business environment and concepts, (3) financial accounting and reporting, and (4) regulation. Candidates are also required to obtain one year of work experience gained in employment in a public accounting firm, government, private industry, or an education institution. CPAs are typically subject to 40 hours per year of continuing professional education.

Personal Financial Specialist ("PFS")

The PFS credential is issued by The American Institute of Certified Public Accountants ("AICPA") and generally requires that candidates be a member of the AICPA, hold an unrevoked CPA certificate issued by a state authority, and have at least two years of full-time teaching or business experience (or 3000 hours equivalent) in personal financial planning within the five-year period preceding the data of the CPA/PFS application. It also requires a minimum of 75 hours of personal financial planning education within the five-year period preceding the date of the PFS application, and candidates must pass a final certification exam. PFS certificate holders are subject to 60 hours of continuing professional education each year. Further information about the qualifications and standards required of a PFS may be found by visiting the AICPA's website at https://www.aicpa.org/membership/join/pfs-eligibility-requirements.html.

Item 3: Disciplinary Information

There are no legal or disciplinary events material to a client's or prospective client's evaluation of Gerard Barrasso.

Item 4: Other Business Activities

A. Gerard Barrasso is not actively engaged in any other investment-related business or occupation.

B. Gerard Barrasso is a certified public accountant, and provides general accounting, financial and business consulting services to clients that may or may not also be investment advisory or financial planning clients of United Financial Planning Group, LLC. To the extent investment advisory or financial planning clients also separately elect to receive accounting, financial, or business consulting services, a conflict of interest exists because Gerard Barrasso will typically receive additional compensation. Gerard Barrasso addresses this conflict of interest by fully disclosing it in this brochure supplement, by providing fee transparency to clients that wish to engage Gerard Barrasso for both investment advisory and accounting services, and by informing clients that they are under no obligation to use Gerard Barrasso for the provision of accounting services.

Item 5: Additional Compensation

Gerard Barrasso does not receive any economic benefit from any third-party other than clients for providing advisory services. Such economic benefits are conveyed through United Financial Planning Group, LLC.

Item 6: Supervision

Gerard Barrasso is the sole investment adviser representative of United Financial Planning Group, LLC as well as its Chief Compliance Officer, and is therefore responsible for supervision and administration of the firm's compliance program pursuant to its written policies and procedures and code of ethics. Gerard Barrasso may be reached by using the contact information on the cover page of this brochure supplement.

United Financial Planning Group, LLC

Form ADV Part 2B Brochure Supplement for Amir Noor

Address:	350 Motor Parkway Suite 300 Hauppauge, NY 11788
Phone:	(631) 234-0871
Email:	amir@unitedfpg.com
Website:	https://www.unitedfpg.com

This brochure supplement provides information about Amir Noor that supplements the United Financial Planning Group, LLC brochure. You should have received a copy of that brochure. Please contact United Financial Planning Group, LLC if you did not receive United Financial Planning Group, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Amir Noor is available on the SEC's website at www.adviserinfo.sec.gov and by searching for CRD# 6415824.

Item 2: Educational Background & Business Experience

Name:	Amir A Noor
Year of Birth:	1992
Education:	Bachelor of Science – Business Administration Finance Specialization State University of New York at Stony Brook 2015
Business Background:	Director of Financial Planning United Financial Planning Group, LLC Feb 2021 – Present Owner Noor Light Enterprises LLC Jan 2017 – Present Owner, Sole Proprietor Amir Noor Consulting Service Jun 2008 – Present Director of Client Services & Operations Cambium Group Sep 2020 – Feb 2021 Registered Representative, Financial Advisor Park Avenue Securities LLC Jun 2014 – Jan 2021 Agent Guardian Life Insurance Co Oct 2016 – Sep 2020 Financial Representative Guardian Life Insurance Co Jul 2015 – Jan 2017
Professional Designations:	<u>Certified Financial Planner ® (“CFP®”)</u> The CFP® certification is a financial planning credential awarded by the Certified Financial Planner Board of Standards Inc. In order to earn and maintain the CFP® designation, individuals must meet the initial certification components of (i) education relevant to the professional, competent, and ethical provision of financial planning services, (ii) pass the certification examination, (iii) attain three years of professional experience, (iv) pass a background check and disclose certain occurrences, (v) complete thirty hours of continuing education every two years, (vi) submit a certification application every two years, and (vii) pay an annual certification fee. Further information about the qualifications and standards

required of a CFP may be found by visiting the CFP Board of Standard’s website at http://www.cfp.net/.

Item 3: Disciplinary Information

There are no legal or disciplinary events material to a client’s or prospective client’s evaluation of Amir Noor.

Item 4: Other Business Activities

A. Amir Noor is the Owner and Sole Proprietor of Amir Noor Consulting Services, an IT Consulting company. He spends less than five hours per month on this non-investment related business, none of which are during trading hours.

B. Amir Noor is also the Owner of Noor Light Enterprises LLC, a holding company for personal real estate purchases and rentals. He spends ten hours per month on this non-investment related business, three of which are during trading hours.

C. Amir Noor does not participate in any other business or occupation for compensation that provides a substantial source of income or involves a substantial amount of time.

Item 5: Additional Compensation

Amir A Noor does not receive any economic benefit from any third-party other than clients for providing advisory services. Such economic benefits are conveyed through United Financial Planning Group, LLC.

Item 6: Supervision

Amir Noor is supervised and monitored by Gerard Barrasso, President, pursuant to United Financial Planning Group, LLC’s written policies and procedures and code of ethics. Gerard Barrasso may be reached at (631) 234-0871.

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United Financial Planning Group, LLC

Form ADV Part 2B Brochure Supplement for John Ferro

Address:	350 Motor Parkway Suite 300 Hauppauge, NY 11788
Phone:	(631) 234-0871
Email:	john@unitedfpg.com
Website:	www.unitedfpg.com

This brochure supplement provides information about John Ferro that supplements the United Financial Planning Group, LLC brochure. You should have received a copy of that brochure. Please contact United Financial Planning Group, LLC if you did not receive United Financial Planning Group, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about John Ferro is available on the SEC's website at www.adviserinfo.sec.gov and by searching for CRD# 2618264.

Item 2: Educational Background & Business Experience

Name:	John Joseph Ferro
Year of Birth:	1971
Education:	BBA, Finance Hofstra University 1993
Business Background:	Financial Advisor United Financial Planning Group, LLC Jun 2021 – Present Licensed Series 3 Futures Trader Eagle Trading Systems Apr 2005 – Feb 2020

Item 3: Disciplinary Information

There are no legal or disciplinary events material to a client's or prospective client's evaluation of John Ferro.

Item 4: Other Business Activities

A. John Ferro is not actively engaged in any other investment-related business or occupation.

B. John Ferro is not actively engaged in any other business or occupation for compensation that provides a substantial source of income or involves a substantial amount of time.

Item 5: Additional Compensation

John Ferro does not receive any economic benefit from any third-party other than clients for providing advisory services. Such economic benefits are conveyed through United Financial Planning Group, LLC.

Item 6: Supervision

John Ferro is supervised and monitored by Gerard Barrasso, Founder & President, pursuant to United Financial Planning Group, LLC's written policies and procedures and code of ethics. Gerard Barrasso may be reached at (631) 234-0871.

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United Financial Planning Group, LLC

Form ADV Part 2B Brochure Supplement for Christine Backel

Address:	350 Motor Parkway Suite 300 Hauppauge, NY 11788
Phone:	(631) 234-0871
Email:	christine@unitedfpg.com
Website:	www.unitedfpg.com

This brochure supplement provides information about Christine Backel that supplements the United Financial Planning Group, LLC brochure. You should have received a copy of that brochure. Please contact United Financial Planning Group, LLC if you did not receive United Financial Planning Group, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Christine Backel is available on the SEC's website at www.adviserinfo.sec.gov and by searching for CRD# 6930894.

Item 2: Educational Background & Business Experience

Name:	Christine Ann Backel
Year of Birth:	1971
Education:	Master of Science in Taxation State University of New York at Old Westbury 2018 Bachelor of Science in Accounting State University of New York at New Paltz 1993
Business Background:	IAR United Financial Planning Group, LLC Feb 2022 – Present President Aurora Consulting Insights LTD Jan 2021 – Present Financial Services Examiner New York State Department of Financial Services Aug 2019 – Present Supervisor Marijean A. Celmer, CPA, PC May 2017 – Present Consultant United Financial Planning Group, LLC Jan 2020 – Feb 2022 Family Office Accountant GM Advisory Group Oct 2018 – Aug 2019 Family Office Manager Strategies for Wealth dba Cornerstone Wealth Advisory Feb 2018 – Oct 2018
Professional Designations:	<u>Certified Financial Planner ® (“CFP®”)</u> The CFP® certification is a financial planning credential awarded by the Certified Financial Planner Board of Standards Inc. In order to earn and maintain the CFP® designation, individuals must meet the initial certification components of (i) education relevant to the professional, competent, and ethical provision of financial planning services, (ii) pass the certification examination, (iii) attain three years of professional experience, (iv) pass a background check and disclose certain occurrences, (v) complete thirty hours of continuing education every two years, (vi) submit a certification application every two

years, and (vii) pay an annual certification fee. Further information about the qualifications and standards required of a CFP may be found by visiting the CFP Board of Standard's website at http://www.cfp.net/.

Certified Public Accountant ("CPA")

The requirements to become a CPA vary by state/jurisdiction, but generally require an undergraduate degree, 150 semester hours of curriculum and the passage of an exam with sections including (1) auditing and attestation, (2) business environment and concepts, (3) financial accounting and reporting, and (4) regulation. Candidates are also required to obtain one year of work experience gained in employment in a public accounting firm, government, private industry, or an education institution. CPAs are typically subject to 40 hours per year of continuing professional education.

Item 3: Disciplinary Information

There are no legal or disciplinary events material to a client's or prospective client's evaluation of Christine Backel.

Item 4: Other Business Activities

A. Christine Backel is President of Aurora Consulting Insights LTD, a firm providing consulting services as well as tax and accounting services. Aurora Consulting Insights LTD is not affiliated with United Financial Planning Group, LLC.

B. Christine Backel is a tax and accounting supervisor with Marijean A. Celmer, CPA, PC.

   Christine Backel is a Financial Services Examiner with the New York State Department of Financial Services.

Item 5: Additional Compensation

Christine Backel does not receive any economic benefit from any third-party other than clients for providing advisory services. Such economic benefits are conveyed through United Financial Planning Group, LLC.

Item 6: Supervision

Christine Backel is supervised and monitored by Gerard Barrasso, Founder & President, pursuant to United Financial Planning Group, LLC's written policies and procedures and code of ethics. Gerard Barrasso may be reached at (631) 234-0871.

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United Financial Planning Group, LLC

Form ADV Part 2B Brochure Supplement for Ryan Derousseau

Address:	350 Motor Parkway Suite 300 Hauppauge, NY 11788
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Email:	ryan@unitedfpg.com
Website:	www.unitedfpg.com

This brochure supplement provides information about Ryan Derousseau that supplements the United Financial Planning Group, LLC brochure. You should have received a copy of that brochure. Please contact United Financial Planning Group, LLC if you did not receive United Financial Planning Group, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Ryan Derousseau is available on the SEC's website at www.adviserinfo.sec.gov and by searching for CRD# 7684477.

Item 2: Educational Background & Business Experience

Name:	Ryan Michael Derousseau
Year of Birth:	1983
Education:	Certificate of Financial Planning Boston University 2021
	MBA, Business and Economic Journalism New York University 2007
	BBA, English, Minors in Business and Journalism University of Texas 2006
Business Background:	Financial Planner United Financial Planning Group, LLC Jan 2023 – Present
	Founder, Director, Writer RMD Media, Inc. Oct 2014 – Present

Item 3: Disciplinary Information

There are no legal or disciplinary events material to a client's or prospective client's evaluation of Ryan Derousseau.

Item 4: Other Business Activities

A. Ryan Derousseau is not actively engaged in any other investment-related business or occupation.

B. Ryan Derousseau is a writer/journalist at RMD Media, Inc. where he participates as the Founder/Director.

Item 5: Additional Compensation

Ryan Derousseau does not receive any economic benefit from any third-party other than clients for providing advisory services. Such economic benefits are conveyed through United Financial Planning Group, LLC.

Item 6: Supervision

Ryan Derousseau is supervised and monitored by Gerard Barrasso, Founder & President, pursuant to United Financial Planning Group, LLC's written policies and procedures and code of ethics. Gerard Barrasso may be reached at (631) 234-0871.