

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 date 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: Certified Financial Planner ® (“CFP®”)

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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 ("Noor Light"), a holding company for personal real estate purchases and rentals. Noor Light may also embark upon joint real estate ventures, which may include the formation of other entities, of which Amir Noor would own indirectly in a shared capacity. 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.

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.

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 Bachel

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: Certified Financial Planner® (“CFP®”)

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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")

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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.

United Financial Planning Group, LLC

Form ADV Part 2B Brochure Supplement for Ryan Derausseau

Address: 350 Motor Parkway
Suite 300
Hauppauge, NY 11788

Phone: (631) 234-0871

Email: ryan@unitedfpg.com

Website: www.unitedfpg.com

This brochure supplement provides information about Ryan Derausseau 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 Derausseau 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 Derosseau

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 Derosseau.

Item 4: Other Business Activities

- A. Ryan Derosseau is not actively engaged in any other investment-related business or occupation.
- B. Ryan Derosseau is a writer/journalist at RMD Media, Inc. where he participates as the Founder/Director.

Item 5: Additional Compensation

Ryan Derosseau 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 Derosseau 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.