



**SFG Wealth Advisors, LLC
(IARD#: 307368)**

Main Office:
705 W. Azelee Street
Tampa, FL 33606

Main Business Phone:
(813) 251-9095

Website:
www.sfgtampa.com

B. Donald Snyder, MBA, CFP[®], CKA[®]
David J. Zallo
Emily E. Kelly
Daniel T. Bader, CFA, CIPM, MBA

**Form ADV Part 2B – Brochure Supplement
for the Advisory Representatives of SFG Wealth Advisors LLC**

March 17, 2026

All Advisory Representatives of SFG Wealth Advisors LLC are located in the Tampa office and can be reached at (813) 251-9095.

This Brochure provides information about the qualifications and background of the registered investment adviser representative listed above. This brochure is a supplement to SFG Wealth Advisors LLC's firm disclosure brochure which you should have received as well. If the reader has any questions about the contents of this Brochure, or if you did not receive SFG Wealth Advisors LLC's brochure, please contact the Chief Compliance Officer via telephone at (813) 251-9095. The information in this brochure has not been approved or verified by the United States Securities and Exchange Commission or by any state securities authority. Additional information about SFG Wealth Advisors LLC and its registered investment adviser representatives can be found on the SEC's website at www.adviserinfo.sec.gov.

Registration as an investment adviser representative does not imply any level of skill or training. The oral and written communication of an adviser provides information about which a prospective client might determine to hire or retain an adviser.

B. Donald Snyder, MBA, CFP®, CKA®
(CRD# 4303557) (Born: 1966)

Item 2 – Educational Background and Business Experience

Formal Education since High School:

Nova Southeastern University, 1991, M.B.A. (Intl. Studies)
Stetson University, 1988, B.B.A. (Marketing)

Business Background:

SFG Wealth Advisors, LLC 2020 – Present
Managing Member, Advisor Representative

*The Strategic Financial Alliance, Inc./
Snyder Financial Group, LLC* 2012 – Present
Registered Representative
Investment Adviser 2012 – 2021

Pacific West Securities, Inc. 2005 – 2012
Registered Representative & Investment Adviser

H. Beck / Capital Financial Group 2000 - 2005
Registered Representative & Investment Adviser

Professional Designations:

CFP® – CERTIFIED FINANCIAL PLANNER®

CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP (with flame design) marks (collectively, the “CFP® marks”) are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”).

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients. To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements (i) Bachelor’s Degree (or higher) from an accredited college university; (ii) Three years of full-time personal financial planning experience; (iii) Completion of a comprehensive program of study; (iv) Successful passing of a 10-hour exam; and, (v) Consent to be bound by the Standards of Professional Conduct, the ethical and practice standards for CFP® professionals. After certification, continued use of the designation mandates 30 hours of continuing education every two years and on-going commitment to the ethics and practice standards.

CKA® – Certified Kingdom Advisor®

The CKA designation is issued by the Kingdom Advisors, Inc. A CKA is a disciple of Christ who has committed to be a person of character who, from a biblical worldview, serves clients with biblical financial advice in order to properly steward the resources entrusted to them. All candidates must complete the Kingdom

Advisors core training and examination, sign a “Statement of Faith,” obtain a letter of reference from pastor or member of pastoral staff, a signed statement of personal stewardship and two client references. A CKA® professional candidate must also hold one of the following designations: CFP, ChFC, CPA/PFS, CFA or AAMS. Continued use of the designation requires ten hours of Kingdom Advisors continuing education credits annually. You can search for your advisers on the CKA website to confirm the criteria has been met: <https://www.kingdomadvisors.org/map.asp>

Item 3 – Disciplinary Information

Mr. Snyder has not been the subject of any legal or disciplinary event.

Item 4 – Other Business Activities

Mr. Snyder is a registered representative of The Strategic Financial Alliance, a registered broker-dealer, doing business as the Snyder Financial Group.

Mr. Snyder is also a licensed insurance agent and may offer insurance products and services through unaffiliated insurance companies.

Item 5 – Additional Compensation

As a registered representative and licensed insurance agent, Mr. Snyder earns commissions or other compensation from the sales of securities and insurance products or services. If your accounts are placed with the broker/dealer, Mr. Snyder may receive compensation in the form of commissions, or a portion of the internal expenses charged by a mutual fund (12b-1 fees) instead of an advisory fee. He may receive benefits such as assistance with marketing from product sponsors, participation in sponsored conferences based on the amounts of commissions and compensation he has earned from the sale of these products.

This additional compensation may present a conflict of interest because it creates an incentive to recommend certain investments over others that may not offer similar compensation. You are not obligated to conduct business with Mr. Snyder in his capacity as a registered representative.

Item 6 – Supervision

Mr. Snyder is the Managing Member of SFG Wealth. He is bound by the firm’s Code of Ethics, its Compliance Procedures, the Standards of Professional Conduct, and the investment advisory agreements with each client. His personal trading accounts are reviewed by David Zallo, who can be reached at (813) 251-9095.

David J. Zallo

(CRD# 8015117) (Born: 1980)

Item 2 – Educational Background and Business Experience

Formal Education since High School:

Liberty University, 2025, MS Finance (Financial Planning)
Webster University, 2011, MA (Management Leadership)
Lehmon College, 2004, BA (Psychology)

Business Background:

SFG Wealth Advisors, LLC 2025 – Present
Advisor Representative

US Army, Commission Officer 2004 – 2025
Manager, Business Development

Item 3 – Disciplinary Information

Mr. Zallo has not been the subject of any legal or disciplinary event.

Item 4 – Other Business Activities

Mr. Zallo has no outside business activities to report.

Item 5 – Additional Compensation

Mr. Zallo has no additional compensation to report.

Item 6 – Supervision

Mr. Zallo advisory activities are supervised by B. Donald Snyder, Managing Member of SFG Wealth. Mr. Snyder can be reached at (813) 251-9095. Mr. Zallo is bound by the firm's Code of Ethics, its Compliance Procedures, the Standards of Professional Conduct, and the investment advisory agreements with each client. His personal trading accounts are reviewed by Mr. B. Donald Snyder, Managing Member, who can be reached at (813) 251-9095.

Emily E. Kelly

(CRD# 6976908) (Born: 1995)

Item 2 – Educational Background and Business Experience

Formal Education since High School:

University of South Florida, 2018, BHS (Health Sciences)

Business Background:

SFG Wealth Advisors, LLC 2026 – Present
Advisor Representative

SFG Wealth Advisors, LLC 2020 – Present
Client Services Coordinator

Snyder Financial Group, LLC 2018 – Present
Client Services Coordinator

Item 3 – Disciplinary Information

Ms. Kelly has not been the subject of any legal or disciplinary event.

Item 4 – Other Business Activities

Ms. Kelly has served as the Client Services Coordinator for Snyder Financial Group since 2018. In this capacity, she performs administrative and client services related functions and does not provide investment advice, make investment recommendations, or receive compensation for this role. This position does not interfere with her responsibilities to advisory clients.

Item 5 – Additional Compensation

Ms. Kelly has no additional compensation to report.

Item 6 – Supervision

Ms. Kelly advisory activities are supervised by B. Donald Snyder, Managing Member of SFG Wealth. Mr. Snyder can be reached at (813) 251-9095. Ms. Kelly is bound by the firm's Code of Ethics, its Compliance Procedures, the Standards of Professional Conduct, and the investment advisory agreements with each client. Her personal trading accounts are reviewed by Mr. B. Donald Snyder, Managing Member, who can be reached at (813) 251-9095.

Daniel T. Bader, CFA, CIPM, MBA
(CRD# 6563038) (Born: 1984)

Item 2 – Educational Background and Business Experience

Formal Education since High School:

Florida State University, 2014 MBA (Business, Management, Marketing)
University of South Florida, 2011 BS (Finance)
Hillsborough CC, 2010 (Business Administration and Management)

Business Background:

SFG Wealth Advisors, LLC 2020 – Present
Employee

The Strategic Financial Alliance, Inc. 2016 – Present
Registered Representative

Snyder Financial Group, LLC 2015 – Present
Financial Analyst

Professional Designations:

CFA® – Chartered Financial Analyst®

The Chartered Financial Analyst (“CFA”) designation is issued by the CFA Institute. CFA candidates must meet one of the following requirements: (1) undergraduate degree and four years of professional experience involving investment decision-making, or (2) four years qualified work experience (full time, but not necessarily investment-related). To receive the CFA designation, candidates must complete the CFA Program which is organized into three levels, each requiring 250 hours of self-study and each culminating in a six-hour exam. There are no ongoing continuing education or experience thresholds necessary to maintain the CFA designation. More information about the designation is available at <https://www.cfainstitute.org>.

CIPM® – Chartered Investment Performance Measurement™

The CIPM® designation is awarded by the CFA Institute to individuals who have completed a rigorous course of study and passed a series of examinations focused on investment performance measurement, attribution, appraisal, and ethical standards. The program emphasizes performance evaluation, manager selection, risk measurement, and the Global Investment Performance Standards (GIPS®). To earn the CIPM® designation, candidates must successfully complete two levels of examinations (Level I and Level II), meet professional work experience requirements, and agree to adhere to the CFA

Institute Code of Ethics and Standards of Professional Conduct. To maintain the CIPM® designation, designees must pay annual membership dues, submit an annual Professional Conduct Statement, and complete a minimum of 15 credits of Mandatory Professional Learning (continuing professional education) annually. Additional information regarding the CIPM® program is available at the CFA Institute’s website.

Item 3 – Disciplinary Information

Mr. Bader has not been the subject of any legal or disciplinary event.

Item 4 – Other Business Activities

Mr. Bader is a registered representative of The Strategic Financial Alliance, a registered broker-dealer, doing business as the Snyder Financial Group.

Mr. Bader has served as a Financial Analyst for Snyder Financial Group since 2015. In this capacity, he performs analysis and client services related functions and does not provide investment advice, make investment recommendations, or receive compensation for this role. This position does not interfere with his responsibilities to advisory clients.

Item 5 – Additional Compensation

As a registered representative, Mr. Bader could be eligible to earn commissions or other compensation from the sales of securities. If your accounts are placed with the broker/dealer, Mr. Bader may receive compensation in the form of commissions, or a portion of the internal expenses charged by a mutual fund (12b-1 fees) instead of an advisory fee. He may receive benefits such as assistance with marketing from product sponsors, participation in sponsored conferences based on the amounts of commissions and compensation he has earned from the sale of these products.

This additional compensation may present a conflict of interest because it creates an incentive to recommend certain investments over others that may not offer similar compensation. You are not obligated to conduct business with Mr. Bader in his capacity as a registered representative.

Item 6 – Supervision

Mr. Bader advisory activities are supervised by B. Donald Snyder, Managing Member of SFG Wealth. Mr. Snyder can be reached at (813) 251-9095. Mr. Bader is bound by the firm’s Code of Ethics, its Compliance Procedures, the Standards of Professional Conduct, and the investment advisory agreements with each client. His personal trading accounts are reviewed by Mr. B. Donald Snyder, Managing Member, who can be reached at (813) 251-9095.