

## **Supervised Person Brochure**

Part 2B of Form ADV

**Paige Loretta Gunn**

**Harwood Advisory Group, LLC**

**1940 East Bay Drive**

**Largo, FL 33771**

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The brochure supplement provides information about Paige Gunn and supplements the Harwood Advisory Group, LLC's brochure. You should have received a copy of that brochure. Please contact Paige Gunn if you did not receive Harwood Advisory Group, LLC's brochure or if you have any questions about the contents of the supplement.

Additional information about Paige Gunn (CRD#5131238) is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

March 23,2018

## **Brochure Supplement (Part 2B of Form ADV)**

### **Supervised Person Brochure**

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#### **Additional Investment Advisor Representative**

**Paige Loretta Gunn**

- Year of birth: 1972
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#### **Educational Background and Business Experience**

Educational Background:

- CSNA; Certified Special Needs Advisor; 2012
- St. Petersburg College; Associate in Arts; 2005

Business Experience:

- Harwood Advisory Group, LLC, Largo, FL; Investment Advisor Representative; 03/2014 - Present
  - The Harwood Insurance Group, LLC, Largo, FL; Insurance Agent; 06/2013 - Present
  - Palm Harbor Group, LLC, Palm Harbor, FL; Managing Member; 12/2009 - Present
  - Trustmont Advisory Group, Inc., Greensburg, PA; Investment Advisor Representative; 10/2012 - 02/2014
  - Trustmont Financial Group, Inc., Greensburg, PA; Registered Representative; 10/2012 - 07/2013
  - Heritage Tax & Retirement; Largo, FL; Insurance Agent: 08/2012-06/2013
  - Merrill Lynch, Inc.; Clearwater, FL; Financial Advisor, 12/2011 - 09/2012
  - Palm Harbor Group, LLC, Palm Harbor, FL; President & CEO; 12/2009 - 12/2011
  - Athena Capital Partners, Tampa, FL; Vice President; 03/2006 - 12/2009
  - Key Financial, Dunedin, FL; Human Resource Director; 08/2005 - 03/2006
  - Perry Ent., Palm Harbor, FL; Collections; 06/1999 - 08/2005
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#### **Disciplinary Information**

None to report

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#### **Other Business Activities**

Ms. Gunn has financial industry affiliated businesses as an insurance agent with The Harwood Insurance Group, LLC. As a salaried employee, Ms. Gunn does not receive commissions or any performance based fees in her capacity as an insurance agent with the Harwood Insurance Group. Approximately 30% of Ms. Gunn's time is spent in these business practices. From time to time, she will offer clients advice or products from those activities.

Ms. Gunn is involved with a non-investment related Real Estate Holding company in an administrative role at Palm Harbor Group, LLC. Approximately 1% of Ms. Gunn's time is spent in these business practices. From time to time, she will offer clients advice or products from those activities.

These practices represent a conflict of interest because it gives Ms. Gunn an incentive to recommend products based on the commission the firm can receive. The conflict is mitigated by the fact that Ms. Gunn has a fiduciary responsibility to place the best interest of the client first and the clients are not required to purchase any products. Clients have the option to purchase these products through another investment advisor representative, or insurance agent of their choosing.

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**Additional Compensation**

As a salaried employee, Ms. Gunn does not receive commissions or any performance based fees in her capacity as an investment advisor representative.

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**Supervision**

Paige Gunn is supervised by Robert Harwood, Chief Compliance Officer. He reviews Paige's work through client account reviews, quarterly personal transaction reports as well as face-to-face and phone interactions.

Mr. Harwood can be contacted at 727-524-1427 or by email at Robert@TheHarwoodWay.com

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**Requirements for State-Registered Advisors**

*Arbitration Claims:* None

*Self-Regulatory Organization or Administrative Proceeding:* None

*Bankruptcy Petition:* None