



Daniel J. Berg
Investment Adviser Representative

Effective: February 29, 2024
Form ADV Part 2B – Brochure Supplement

This Form ADV 2B (“Brochure Supplement”) provides information about the background and qualifications of Daniel J. Berg (CRD# **5437291**) in addition to the information contained in the B.E.S.T. Wealth Management LLC (“B.E.S.T.” or the “Advisor” - CRD #160920) Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of the B.E.S.T. Disclosure Brochure or this Brochure Supplement, please contact us at (314) 801-1324 or by email at info@bestwealth.net.

Additional information about Mr. Berg is available on the SEC’s Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching with his full name or his Individual CRD# 5437291.

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Item 2 – Educational Background and Business Experience

Mr. Berg, born in 1969, is a dedicated Income Tax Specialist for Client accounts of B.E.S.T. Mr. Berg earned a Bachelor of Science in Business Administration from William Woods University in 1999. Mr. Berg also attended University of Missouri with a major in Accounting in 1988 - 1992. Additional information regarding Mr. Berg's employment history is included below.

Employment History:

Investment Adviser Representative, B.E.S.T. Wealth Management	02/2019 to Present
Income Tax Specialist, Green Course Financial Advisors	10/2007 to 11/2018

Item 3 – Disciplinary Information

There are no legal, civil or disciplinary events to disclose regarding Mr. Berg. Mr. Berg has never been involved in any regulatory, civil or criminal action. There have been no client complaints, lawsuits, arbitration claims or administrative proceedings against Mr. Berg.

Securities laws require an advisor to disclose any instances where the advisor or its advisory persons have been found liable in a legal, regulatory, civil or arbitration matter that alleges violation of securities and other statutes; fraud; false statements or omissions; theft, embezzlement or wrongful taking of property; bribery, forgery, counterfeiting, or extortion; and/or dishonest, unfair or unethical practices. ***As previously noted, there are no legal, civil or disciplinary events to disclose regarding Mr. Berg.*** However, we do encourage you to independently view the background of Mr. Berg on the Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching with his full name or his Individual CRD# 5437291.

Item 4 – Other Business Activities

Mr. Berg is a sole proprietor of Daniel J. Berg, a real estate property. He spends less than 1% of his time on this non-investment related activity.

Item 5 – Additional Compensation

Mr. Berg does not receive other forms of compensation.

Item 6 – Supervision

Mr. Berg is supervised by Mr. Tinnon who serves as the Principal and the Chief Compliance Officer of B.E.S.T. Mr. Tinnon can be reached at (314) 801-1324.

B.E.S.T. has implemented a Code of Ethics and internal compliance that guide each Supervised Person in meeting their fiduciary obligations to Clients of B.E.S.T. Further; B.E.S.T. is subject to regulatory oversight by various agencies. These agencies require registration by B.E.S.T. and its Supervised Persons. As a registered entity, B.E.S.T. is subject to examinations by regulators, which may be announced or unannounced. B.E.S.T. is required to periodically update the information provided to these agencies and to provide various reports regarding the business activities and assets of the Advisor.

Item 7 – Requirements for State Registered Advisors

Mr. Berg does not have any additional information to disclose.