



Balanced Wealth
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YOUR PARTNER IN PROSPERITY

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BALANCED WEALTH STRATEGIES, LLC

PART 2B OF FORM ADV: BROCHURE SUPPLEMENT

Supervised Person: MARK J. BURGER

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This brochure supplement provides information about Mark J. Burger that supplements the Balanced Wealth Strategies, LLC brochure. You should have received a copy of that brochure. Please contact Mark J. Burger at 877-484-3311 or email at mburger@markjburgercpa.com if you did not receive Balanced Wealth Strategies LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Mark J. Burger is available on the SEC's website at www.adviserinfo.sec.gov. Mark J Burger CRD number is: 8034870.



Item2. EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Mark J. Burger was born in 1962 and graduated from the University of South Florida with a BA in accounting in 1984. Mark J. Burger also graduated from Florida International University with a Master of Science in Taxation (MST) in 1987.

Mark incorporated Mark J. Burger PA in 1995; Mark has been the owner of Mark J. Burger PA. Mark J Burger PA is a certified public accounting firm providing tax and advisory services.

The minimum qualifications for obtaining a CPA license start with requiring 150 semester hours in undergraduate accounting and business coursework. The final qualification is the passing of all four parts of a very comprehensive exam.

To maintain this license, a CPA must have at least 80 hours of CPE every two years including at least 4 hours in ethics courses and 8 hours in accounting or auditing courses.

Mark J. Burger is the managing member and 33.33% owner of GuidePoint PEO, LLC is an AI First organization focuses on web-based affiliated marketing for Professional Employer Organization. Balanced Wealth Strategies LLC will contract with GuidePoint PEO LLC to manage and support the organization website and online activities. We believe this is to our client's benefit as it helps to create better lines of communication and does not represent a material conflict of interest. He spends approximately 10% of his time to that company. GuidePoint PEL LLC has offices at 4440 PGA Boulevard, Suite 600, Palm Beach gardens, FL 33410.

Item 3. DISCIPLINARY INFORMATION

Mark J. Burger, CPA, has never been subject to any legal or disciplinary events. This would include any criminal or civil actions, administrative proceedings, self-regulatory organization proceedings or any other hearing or formal adjudication in which a professional attainment, designation, or license was revoked or suspended because of a violation of rules relating to professional conduct.

Item 4. OTHER BUSINESS ACTIVITIES

Mark J. Burger CPA is not a broker-dealer, registered representative of a broker-dealer, futures commission merchant, commodity pool operator, commodity trading advisor, nor is it associated with any such aforementioned professionals nor has any applications pending to register as such.

Mark J. Burger CPA, the principal officer of the company, is also the sole owner of Mark J. Burger PA, a Florida Corporation with offices in Palm Beach Gardens, FL, and Orford New Hampshire. Mark Provides tax and advisory services to his clients. Balanced Wealth Strategies LLC believes this is to our client's benefit as it helps to create the maximum



amount of tax efficiency within our clients' investments and does not represent a material conflict of interest. He spends approximately 90% of his time to that company.

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Item 5. ADDITIONAL COMPENSATION

Mark J. Burger does not receive any economic benefit directly for providing advisory services Balanced Wealth Strategies LLC Clients. All compensation of any kind earned for services provided to Balanced Wealth Strategies LLC clients, including any bonuses, are paid to Balanced Wealth Strategies, LLC and are disclosed in the brochure for Balanced Wealth Strategies, LLC.

Item 6. SUPERVISION

Mark J. Burger is the Principal Owner of Balanced Wealth Strategies LLC and does not have any employees or independent contractors under his employ. He is the only person authorized by Balanced Wealth Strategies, LLC to provide any advisory services.

Item 7: REQUIREMENTS FOR STATE REGISTERED ADVISORS

Mark J. Burger has never been involved in any award or been found liable in any arbitration claim, civil, self-regulatory organization, or any administrative proceeding.

Mark J. Burger has never been the subject of a bankruptcy petition.