

Form ADV Part 2B – Brochure Supplement

for

**Shanna J. Reed
Investment Advisor Representative**

Effective: August 27, 2025

Gilbert, AZ

This Form ADV 2B (“Brochure Supplement”) provides information about the background and qualifications of Shanna J. Reed (CRD# 4734752) in addition to the information contained in the Maridea Wealth Management LLC (“Maridea” or the “Advisor”, CRD# 325523) Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of the Maridea Disclosure Brochure or this Brochure Supplement, please contact us at (347) 289-5227.

Additional information about Ms. Reed is available on the SEC’s Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching with her full name or her Individual CRD# 4734752.

Item 2 – Educational Background and Business Experience

Shanna J. Reed, born in 1973, is dedicated to advising Clients of Maridea as an Investment Advisor Representative. Ms. Reed earned her Masters of Organizational Management, Business from University of Phoenix in 2004. Additional information regarding Ms. Reed's employment history is included below.

Employment History:

Investment Advisor Representative, Maridea Wealth Management LLC	08/2025 to Present
Insurance Agent, Maridea Insurance Company, LLC	08/2025 to Present
Registered Representative, Cambridge Investment Research, Inc.	04/2015 to 08/2025
Investment Advisor Representative, Cambridge Investment Research Advisors, Inc.	04/2015 to 08/2025

Item 3 – Disciplinary Information

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

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 Ms. Reed.***

However, we do encourage you to independently view the background of Ms. Reed on the Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching with her full name or her Individual CRD# 4734752.

Item 4 – Other Business Activities

Insurance Agency Affiliations

Ms. Reed is also a licensed insurance professional with Maridea Insurance Company, LLC, an affiliated entity. Implementations of insurance recommendations are separate and apart from Ms. Reed's role with Maridea. As an insurance professional, Ms. Reed will receive customary commissions and other related revenues from the various insurance companies whose products are sold. Ms. Reed is not required to offer the products of any particular insurance company. Commissions generated by insurance sales do not offset regular advisory fees. This practice presents a conflict of interest in recommending certain products of the insurance companies. Clients are under no obligation to implement any recommendations made by Ms. Reed or the Advisor. Ms. Reed spends approximately 10% of her time per month in this capacity.

By HFS

Ms. Reed is also the Owner of By HFS. Ms. Reed offers financial coaching, tax, divorce, estate planning, and business legal services through By HFS, which are separate in addition to advisory services offered by Maridea. Ms. Reed spends less than 5% of her time per month in this capacity.

Item 5 – Additional Compensation

Ms. Reed has additional business activities where compensation is received that are detailed in Item 4 above.

Item 6 – Supervision

Ms. Reed serves as an Investment Advisor Representative of Maridea and is supervised by Robert Pagliuco, the Chief Compliance Officer. Mr. Pagliuco can be reached at (347) 289-5227.

Maridea has implemented a Code of Ethics, an internal compliance document that guides each Supervised Person in meeting their fiduciary obligations to Clients of Maridea. Further, Maridea is subject to regulatory

oversight by various agencies. These agencies require registration by Maridea and its Supervised Persons. As a registered entity, Maridea is subject to examinations by regulators, which may be announced or unannounced. Maridea 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.