



## Form ADV Part 2B – Individual Disclosure Brochure

*for*

### **Michael Potter**

Personal CRD Number: 6525231

Investment Adviser Representative

*This brochure supplement provides information about Michael Potter that supplements the True Wealth Financial Group LLC (D/B/A Baby Step Advisor) brochure. You should have received a copy of that brochure. Please contact Michael Potter if you did not receive True Wealth Financial Group LLC's brochure or if you have any questions about the contents of this supplement.*

*Additional information about Michael Potter is also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).*

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UPDATED: 12/31/2021

## Item 2: Educational Background and Business Experience

**Name:** Michael Potter                      **Born:** 1977

### **Educational Background and Professional Designations:**

#### **Education:**

Masters Business Administration, Phoenix University - 2010  
Bachelors Information Systems Management, University of Maryland University  
College - 2004

#### **Business Background:**

06/2018 - Present	Managing Member & Chief Compliance Officer True Wealth Financial Group LLC
09/2018 - Present	Investment Advisor Representative True Wealth Financial Group LLC
11/2017 - 12/2018	Sr. Enterprise Architect Exostrategies Inc
06/2015 - 12/2016	Registered Representative and Investment Advisor Representative Securities America Advisors, Inc
01/2011 - 12/2013	Owner, Financial Coach and Counselor Doulos Financial

## Item 3: Disciplinary Information

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

#### **Item 4: Other Business Activities**

Michael Potter is a Cyber Analyst for Raytheon Space and Intelligence supporting the department of homeland security with cyber incident response services. He does/will not offer services from this outside activity to clients of True Wealth Financial Group LLC.

#### **Item 5: Additional Compensation**

Michael Potter does not receive any economic benefit from any person, company, or organization, other than True Wealth Financial Group LLC in exchange for providing clients advisory services through True Wealth Financial Group LLC.

#### **Item 6: Supervision**

As the Chief Compliance Officer of True Wealth Financial Group LLC, Michael Potter supervises all activities of the firm. Michael Potter's contact information is on the cover page of this disclosure document. Michael Potter adheres to applicable regulatory requirements, together with all policies and procedures outlined in the firm's code of ethics and compliance manual.

## Item 7: Requirements For State Registered Advisers

*This disclosure is required by state securities authorities and is provided for your use in evaluating this investment advisor representative's suitability.*

A. Michael Potter has NOT been involved in any of the events listed below.

1. An award or otherwise being found liable in an arbitration claim alleging damages in excess of \$2,500, involving any of the following:
  - a) an investment or an investment-related business or activity;
  - b) fraud, false statement(s), or omissions;
  - c) theft, embezzlement, or other wrongful taking of property;
  - d) bribery, forgery, counterfeiting, or extortion; or
  - e) dishonest, unfair, or unethical practices.
  
2. An award or otherwise being found liable in a civil, self-regulatory organization, or administrative proceeding involving any of the following:
  - a) an investment or an investment-related business or activity;
  - b) fraud, false statement(s), or omissions;
  - c) theft, embezzlement, or other wrongful taking of property;
  - d) bribery, forgery, counterfeiting, or extortion; or
  - e) dishonest, unfair, or unethical practices.

B. Michael Potter has NOT been the subject of a bankruptcy.