

Dalton J. Helvey

Personal CRD Number: 6928893

Chief Executive Officer / Investment Adviser Representative

U.S. Private Wealth, LLC

4822 Northlake Boulevard, Suite A
Palm Beach Gardens, FL 33418

Phone Number (561) 855-4635

Website: www.usprivatewealth.com

E-Mail: dalton@leanonthewall.com

June 10, 2025

Form ADV Part 2B Brochure Supplement

This Brochure Supplement provides information about Dalton J. Helvey that supplements the Disclosure Brochure of U.S. Private Wealth, LLC (hereinafter "USPW"), a copy of which you should have received. Please contact USPW's Chief Compliance Officer if you did not receive the Disclosure Brochure or if you have any questions about the contents of this Brochure Supplement. Additional information about Dalton J. Helvey is available on the SEC's website at www.adviserinfo.sec.gov.

Educational Background and Business Experience - Item 2

Dalton J. Helvey

Year of Birth: 1995

Formal Education After High School:

- University of Michigan, Bachelor of Business Administration Dual Major Finance + Accounting, 2018

Business Background for the Previous Five Years:

- U.S. Private Wealth, LLC, CCO (4/2025) & Investment Adviser Representative, 05/2019 to Present
- U.S. Private Wealth, LLC, Associate, 01/2019 to 04/2019
- VFG Associates LLC, MI, New Business Manager, 04/2015 to 12/2018

Disciplinary Information - Item 3

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of Mr. Helvey and USPW. Mr. Helvey has not been involved in any reportable disciplinary events.

Other Business Activities - Item 4

Mr. Helvey is not involved in any other business activities.

Additional Compensation – Item 5

Apart from the receipt of compensation for the activities disclosed under Item 4 above, Dalton J. Helvey does not receive additional compensation or economic benefits from third party sources in connection with his advisory activities.

Supervision - Item 6

As the Chief Compliance Officer and representative of USPW, Dalton J. Helvey supervises all duties and activities of the firm. Dalton J. Helvey's contact information is on the cover page of this disclosure document. Dalton J. Helvey adheres to all required regulations regarding the activities of an Investment Adviser Representative and follows all policies and procedures outlined in the firm's policies and procedures manual, including the Code of Ethics, and appropriate securities regulatory requirements.

Requirements for State-Registered Advisers - Item 7

This disclosure is required by state securities authorities. As such, we are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of Dalton J. Helvey.

- A. Dalton J. Helvey 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. Dalton J. Helvey has NOT been the subject of a bankruptcy.

Information regarding Dalton J. Helvey's history can be found online at www.adviserinfo.sec.gov. His individual CRD number is 6928893.