

Jennifer B. Telesca, CIMA® CRC®

XML Financial Group
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This document provides information about Jennifer Telesca that supplements the XML Financial Group (XML) ADV 2A Brochure and Wrap Fee Program Brochure (“Brochures”). If you were not provided with a Brochure or if you have questions about the content of this supplement please contact Compliance at info@xmlfg.com or 703.827.2300. The Brochures and additional information about XML and Jennifer Telesca are available on the SEC’s website at adviserinfo.sec.gov.

ITEM 2 EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Jennifer holds a B.A. from Franklin and Marshall College and an M.A. from The University of Maryland, College Park. She has also earned her Certified Investment Management Analyst® and Chartered Retirement Planning Counselor® designations. Jennifer joined XML Financial Group in 2022 as a Client Relationship Manager of the Samson Wealth Management Group division. She is also a registered representative with the affiliated broker-dealer, XML Securities, LLC, member FINRA/SIPC (“XML BD”). Previously, Jennifer was a Client Relationship Manager with Wells Fargo Advisors Financial Network, LLC.

CERTIFIED INVESTMENT MANAGEMENT ANALYST (CIMA) - Currently offered and recognize by the Investments & Wealth Institute. Candidate must meet the following requirements: Three years of financial services experience and a satisfactory record of ethical conduct, as determined by Investments & Wealth Institute Admissions Committee. Continuing Education Requirements are 40 hours every two years. To view the status of a professional's designation visit <https://investmentsandwealth.org/investors>.

CERTIFIED RETIREMENT COUNSELOR (CRC) - Currently offered and recognize by the International Foundation for Retirement Education (InfRE). Prerequisites are a Bachelors degree or equivalent with two years relevant professional experience (within the past five years) or high school diploma or equivalent with five years relevant professional experience (within the past seven years) and passing a background check. Continuing Education Requirements are 15 hours per year, including at least two hours of ethics every two years. To view the status of a professional's designation visit <https://infre.org/find-a-crc-professional/>.

ITEM 3 DISCIPLINARY INFORMATION - None

ITEM 4 OTHER BUSINESS ACTIVITIES

BROKER AGENT: Jennifer is a registered representative with XML BD. This enables her to effect securities transactions for a commission in her capacity as a broker agent. She is able to offer brokerage services to both clients and non-clients of XML. When acting in the capacity as a broker agent, she will receive compensation based on the sale of securities and brokerage products including, but not limited to, mutual fund share classes that pay sale charges and distribution or service (“trail”) fees, transaction commissions, markup and markdowns on principal trades in bonds and other compensation as detailed in the Reg BI Disclosure document. This creates a conflict of interest as there is an inherent incentive to recommend brokerage products and effect transactions based on the broker agent’s compensation. Please discuss any questions regarding brokerage compensation and the related conflicts of interest with this professional. Visit <https://www.xmlfg.com/brokerage-services> to view the Reg BI Disclosure and additional disclosures and policies.

ITEM 5 ADDITIONAL COMPENSATION - None

ITEM 6 SUPERVISION

XML’s investment advisor supervisory system includes, but is not limited to, principal approval of advisory agreements and amendments, email sample review, outside account review and trade monitoring. This individual’s designated supervisor is Mark D. Samson at 215-693-5000.