

*This brochure supplement provides information about Dalton J. Helvey that supplements the U.S. Private Wealth, LLC brochure. You should have received a copy of that brochure. Please contact Dalton J. Helvey, Investment Adviser Representative if you did not receive U.S. Private Wealth, LLC's brochure or if you have any questions about the contents of this supplement.*

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



# U.S. PRIVATE WEALTH

## **U.S. Private Wealth, LLC**

Form ADV Part 2B – Individual Disclosure Brochure

*for*

**Dalton J. Helvey**

CRD Number: 6928893 Investment  
Adviser Representative

U.S. Private Wealth, LLC  
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UPDATED: September 15, 2020

## Item 2: Educational Background and Business Experience

**Name:** Dalton J. Helvey

**Born:** 1995

### **Educational Background and Business Experience:**

#### **Education:**

Dalton J. Helvey received his Bachelor of Business Administration – BBA, Dual Major: Finance and Accounting from University of Michigan

#### **Business Background (for last five years):**

05/2019 – Present	Investment Adviser Representative U.S. Private Wealth, LLC
01/2019 – 04/2019	Associate U.S. Private Wealth, LLC
04/2015 – 12/2018	New Business Manager VFG Associates LLC, MI

## Item 3: Disciplinary Information

No disciplinary information to disclose

## Item 4: Other Business Activities

No other business activities to disclose

## Item 5: Additional Compensation

Other than salary, annual bonuses, or regular bonuses, Dalton J. Helvey does not receive any economic benefit from any person, company, or organization, in exchange for providing clients advisory services through USPW.

## Item 6: Supervision

Michael D. Wall supervises all duties and activities of the firm. Michael D. Wall'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

## 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. 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 petition.