



## IAPD Report

# JOSEPH JUDE BILELLO

CRD# 1867755

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Please contact FINRA with any concerns.



## IAPD Information About Representatives

IAPD offers information on all current-and many former representatives. Investors are strongly encouraged to use IAPD to check the background of representatives before deciding to conduct, or continue to conduct, business with them.

### What is included in a IAPD report?

IAPD reports for individual representatives include information such as employment history, professional qualifications, disciplinary actions, criminal convictions, civil judgments and arbitration awards.

It is important to note that the information contained in an IAPD report may include pending actions or allegations that may be contested, unresolved or unproven. In the end, these actions or allegations may be resolved in favor of the representative, or concluded through a negotiated settlement with no admission or finding of wrongdoing.

### Where did this information come from?

The information contained in IAPD comes from the Investment Adviser Registration Depository (IARD) and FINRA's Central Registration Depository, or CRD, (see more on CRD below) and is a combination of:

- information the states require representatives and firms to submit as part of the registration and licensing process, and
- information that state regulators report regarding disciplinary actions or allegations against representatives.

### How current is this information?

Generally, representatives are required to update their professional and disciplinary information in IARD within 30 days.

### Need help interpreting this report?

For help understanding how to read this report, please consult NASAA's IAPD Tips page  
<http://www.nasaa.org/IAPD/IARReports.cfm>

### What if I want to check the background of an Individual Broker or Brokerage Firm?

To check the background of an Individual Broker or Brokerage firm, you can search for the firm or individual in IAPD. If your search is successful, click on the link provided to view the available licensing and registration information in FINRA's BrokerCheck website.

### Are there other resources I can use to check the background of investment professionals?

It is recommended that you learn as much as possible about an individual representative or Investment Adviser firm before deciding to work with them. Your state securities regulator can help you research individuals and certain firms doing business in your state. The contact information for state securities regulators can be found on the website of the North American Securities Administrators Association <http://www.nasaa.org>



## Report Summary

### JOSEPH JUDE BILELLO (CRD# 1867755)

The report summary provides an overview of the representative's professional background and conduct. The information contained in this report has been provided by the representative, investment adviser and/or securities firms, and/or securities regulators as part of the states' investment adviser registration and licensing process. The information contained in this report was last updated by the representative, a previous employing firm, or a securities regulator on **08/18/2025**.

### CURRENT EMPLOYERS

	Firm	CRD#	Registered Since
<b>B</b>	G. A. REPPLER & COMPANY	CRD# 17486	02/06/1992
<b>IA</b>	G. A. REPPLER & COMPANY	CRD# 17486	02/06/1992
<b>IA</b>	AVANTI WEALTH MANAGEMENT	CRD# 137322	03/09/2006

### QUALIFICATIONS

This representative is currently registered in **1** SRO(s) and **20** jurisdiction(s).

Is this representative currently Inactive or Suspended with any regulator? **No**

**Note:** Not all jurisdictions require IAR registration or may have an exemption from registration. Additional information including this individual's qualification examinations and professional designations is available in the Detailed Report.

### REGISTRATION HISTORY

This representative was previously registered with the following firm(s):

	FIRM	CRD#	LOCATION	REGISTRATION DATES
<b>B</b>	MUTUAL SERVICE CORPORATION	4806	BOSTON, MA	03/31/1989 - 02/18/1992
<b>B</b>	LOWRY FINANCIAL SERVICES CORPORATION	7291	NORTH PALM BEACH, FL	09/08/1988 - 03/31/1989

For additional registration and employment history details as reported by the individual, refer to the Registration and Employment History section of the Detailed Report.

### DISCLOSURE INFORMATION

Disclosure events include certain criminal charges and convictions, formal investigations and disciplinary actions initiated by regulators, customer disputes and arbitrations, and financial disclosures such as bankruptcies and unpaid judgments or liens.

Are there events disclosed about this representative? **Yes**

The following types of events are disclosed about this representative:

Type	Count
Customer Dispute	2



## Qualifications

### REGISTRATIONS

This section provides the SRO, states and U.S. territories in which the representative is currently registered and licensed, the category of each registration, and the date on which the registration becomes effective. This section also provides, for each firm with which the representative is currently employed, the address of each location where the representative works. This individual is currently registered with 20 jurisdiction(s) and 1 SRO(s) through his or her employer(s).

#### Employment 1 of 2

Firm Name: **G. A. REPPLE & COMPANY**

Main Address: 101 NORMANDY ROAD  
CASSELBERRY, FL 32707

Firm ID#: 17486

Regulator	Registration	Status	Date
<b>B</b> FINRA	Corporate Securities Represent	Approved	02/06/1992
<b>B</b> FINRA	Direct Participation Programs	Approved	02/06/1992
<b>B</b> FINRA	Invest. Co and Variable Contracts	Approved	02/06/1992
<b>B</b> FINRA	General Securities Principal	Approved	08/31/1994
<b>B</b> FINRA	Investment Banking Representative	Approved	02/18/2010
<b>B</b> FINRA	Operations Professional	Approved	12/13/2011
<b>B</b> FINRA	Investment Banking Principal	Approved	10/01/2018
<b>B</b> Alabama	Agent	Approved	06/13/2018
<b>B</b> California	Agent	Approved	11/11/1993
<b>B</b> Colorado	Agent	Approved	07/11/2000
<b>B</b> Delaware	Agent	Approved	03/24/2000
<b>B</b> Florida	Agent	Approved	02/06/1992
<b>IA</b> Florida	Investment Adviser Representative	Approved	02/06/1992



## Qualifications

Regulator	Registration	Status	Date
B Georgia	Agent	Approved	02/03/1993
B Maine	Agent	Approved	08/18/2025
B Massachusetts	Agent	Approved	03/27/2017
B Michigan	Agent	Approved	07/11/2000
B New Jersey	Agent	Approved	01/09/2025
B New York	Agent	Approved	06/19/1992
B North Carolina	Agent	Approved	01/08/2004
B Ohio	Agent	Approved	07/17/1996
B Pennsylvania	Agent	Approved	03/29/1994
B South Carolina	Agent	Approved	01/04/2012
IA South Carolina	Investment Adviser Representative	Approved	01/09/2025
B South Dakota	Agent	Approved	01/03/2022
B Tennessee	Agent	Approved	03/29/2011
B Texas	Agent	Approved	07/14/2014
B Virginia	Agent	Approved	11/15/2005
IA Virginia	Investment Adviser Representative	Approved	01/03/2022
B Washington	Agent	Approved	08/02/2021

## Branch Office Locations

**G. A. REPPLE & COMPANY**  
110 CROWN OAK CENTRE DRIVE



## Qualifications

LONGWOOD, FL 32750

### Employment 2 of 2

Firm Name: **AVANTI WEALTH MANAGEMENT**

Main Address: 110 CROWN OAK CENTRE DRIVE  
LONGWOOD, FL 32750-6166

Firm ID#: 137322

Regulator	Registration	Status	Date
IA Florida	Investment Adviser Representative	Approved	03/09/2006
IA Texas	Investment Adviser Representative	Restricted Approval	07/06/2023

### Branch Office Locations

**AVANTI WEALTH MANAGEMENT**

110 CROWN OAK CENTRE DRIVE  
LONGWOOD, FL 32750-6166



## Qualifications

### PASSED INDUSTRY EXAMS

This section includes all industry exams that the representative has passed. Under limited circumstances, a representative may attain registration after receiving an exam waiver based on a combination of exams the representative has passed and qualifying work experience. Likewise a new exam requirement may be grandfathered based on a representative's specific qualifying work experience. Exam waivers and grandfathering are not included below.

**This individual has passed 1 principal/supervisory exam, 6 general industry/product exams, and 1 state securities law exam.**

#### Principal/Supervisory Exams

Exam	Category	Date
 General Securities Principal Examination (S24)	Series 24	08/30/1994

#### General Industry/Product Exams

Exam	Category	Date
 Operations Professional Examination (S99TO)	Series 99TO	01/02/2023
 Investment Banking Registered Representative Examination (S79TO)	Series 79TO	01/02/2023
 Securities Industry Essentials Examination (SIE)	SIE	10/01/2018
 Corporate Securities Limited Representative Examination (S62)	Series 62	08/01/1991
 Direct Participation Programs Representative Examination (S22)	Series 22	04/18/1989
 Investment Company Products/Variable Contracts Representative Examination (S6)	Series 6	09/06/1988

#### State Securities Law Exams

Exam	Category	Date
 Uniform Securities Agent State Law Examination (S63)	Series 63	06/17/1992

### PROFESSIONAL DESIGNATIONS

This section details that the representative has reported **1** professional designation(s).

Chartered Financial Consultant

This representative holds or did hold **1** professional designation(s) that may have been used to qualify as an Investment Advisor



representative. Please check with the appropriate designation authority for verification that the designation is still in effect. The contact information for these professional designation authorities can be found on the website for the North American Securities Administrators Association at <http://www.nasaa.org>



## Registration & Employment History

### PREVIOUSLY REGISTERED WITH THE FOLLOWING FIRMS

This representative held registrations with the following firms:

	Registration Dates	Firm Name	ID#	Branch Location
<b>B</b>	03/31/1989 - 02/18/1992	MUTUAL SERVICE CORPORATION	CRD# 4806	BOSTON, MA
<b>B</b>	09/08/1988 - 03/31/1989	LOWRY FINANCIAL SERVICES CORPORATION	CRD# 7291	NORTH PALM BEACH, FL

### EMPLOYMENT HISTORY

Below is the representative's employment history for up to the last 10 years.

Employment Dates	Employer Name	Position	Investment Related	Employer Location
01/2006 - Present	AVANTI WEALTH MANAGEMENT, LLC	MANAGING MEMBER AND CHIEF COMPLIANCE OFFICER	Y	LONGWOOD, FL, United States
02/1992 - Present	AVANTI FINANCIAL GROUP, INC.	CONSULTING	Y	LONGWOOD, FL, United States
02/1992 - Present	G. A. REPPLER & COMPANY	REGISTERED REPRESENTATIVE AND ADVISORY REPRESENTATIVE	Y	LONGWOOD, FL, United States

### OTHER BUSINESS ACTIVITIES

This section includes information, if any, as provided by the representative regarding other business activities the representative is currently engaged in either as a proprietor, partner, officer, director, employee, trustee, agent, or otherwise. This section does not include non-investment related activity that is exclusively charitable, civic, religious, or fraternal and is recognized as tax exempt.

Avanti Wealth Management, LLC - 110 Crown Oak Centre Drive, Longwood, FL 32750 - Managing Partner - Registered Investment Advisor - Investment related - Started 8/2003 - 160 hrs. per month, 8 hrs. during trading.

Avanti Financial Group, Inc. - 110 Crown Oak Centre Drive, Longwood, FL 32750 President- Fixed Insurance sales and financial planning services - investment related - 160 hrs. per month, 8 hrs. per month during trading hrs.

Pareto Media LLC - 110 Crown Oak Centre Drive, Longwood, FL 32750 - Managing Member - Marketing & Publisher - non-investment related - Started 3/2002 - 2 hrs. per month, non during trading hrs.

Family Bank Design Center LLC - 110 Crown Oak Centre Drive, Longwood, FL 32750 - Managing Member - Planned giving consulting - Started 4/2002 - non-investment related - 4 hrs. per month non during trading hrs.

Seminole County Young Life - P.O. Box 623306, Oviedo, FL 32762 - Board member - Provide oversight for the program to fulfill its mission. Review and approve annual operating budget, assess, and evaluate the success of the organizational goals and ministry objectives - Started 2/2021 - non-investment related - 4 hrs. per month non during trading hrs.

Avanti Financial Advisors - 110 Crown Oak Centre Drive, Longwood, FL 32750 - President - Started 10/1996 - Corporate name only - non-investment relate - 0 hrs. per month.



## Disclosure Summary

### Disclosure Information

#### What you should know about reported disclosure events:

##### (1) Certain thresholds must be met before an event is reported to IARD, for example:

- A law enforcement agency must file formal charges before an Investment Adviser Representative is required to report a particular criminal event.;
- A customer dispute must involve allegations that an Investment Adviser Representative engaged in activity that violates certain rules or conduct governing the industry and that the activity resulted in damages of at least \$5,000.

##### (2) Disclosure events in IAPD reports come from different sources:

As mentioned in the "About IAPD" section on page 1 of this report, information contained in IAPD comes from Investment Adviser Representatives, firms and regulators. When more than one of these sources reports information for the same disclosure event, all versions of the event will appear in the IAPD report. The different versions will be separated by a solid line with the reporting source labeled.

##### (3) There are different statuses and dispositions for disclosure events:

- A disclosure event may have a status of *pending*, *on appeal*, or *final*.
  - A "pending" disclosure event involves allegations that have not been proven or formally adjudicated.
  - A disclosure event that is "on appeal" involves allegations that have been adjudicated but are currently being appealed.
  - A "final" disclosure event has been concluded and its resolution is not subject to change.
- A final disclosure event generally has a disposition of *adjudicated*, *settled* or *otherwise resolved*.
  - An "adjudicated" matter includes a disposition by (1) a court of law in a criminal or civil matter, or (2) an administrative panel in an action brought by a regulator that is contested by the party charged with some alleged wrongdoing.
  - A "settled" matter generally represents a disposition wherein the parties involved in a dispute reach an agreement to resolve the matter. Please note that Investment Adviser Representatives and firms may choose to settle customer disputes or regulatory matters for business or other reasons.
  - A "resolved" matter usually includes a disposition wherein no payment is made to the customer or there is no finding of wrongdoing on the part of the Investment Adviser Representative. Such matters generally involve customer disputes.

##### (4) You may wish to contact the Investment Adviser Representatives to obtain further information regarding any of the disclosure events contained in this IAPD report.



## DISCLOSURE EVENT DETAILS

When evaluating this information, please keep in mind that some items may involve pending actions or allegations that may be contested and have not been resolved or proven. The event may, in the end, be withdrawn, dismissed, resolved in favor of the Investment Adviser Representative, or concluded through a negotiated settlement with no admission or finding of wrongdoing.

This report provides the information exactly as it was reported to the Investment Adviser Registration Depository. Some of the specific data fields contained in the report may be blank if the information was not provided.

The following types of events are disclosed about this representative:

Type	Count
Customer Dispute	2

### Customer Dispute

This section provides information regarding a customer dispute that was reported to the Investment Adviser Registration Depository (IARD) by the Investment Adviser Representative (IAR), an investment adviser and/or securities firm, and/or a securities regulator. The event may include a consumer-initiated, investment-related complaint, arbitration proceeding or civil suit that contains allegations of sales practice violations against the individual.

The customer dispute may be pending or may have resulted in a civil judgment, arbitration award, monetary settlement, closure without action, withdrawal, dismissal, denial, or other outcome.

#### Disclosure 1 of 2

<b>Reporting Source:</b>	Individual
<b>Employing firm when activities occurred which led to the complaint:</b>	G A REPPLLE & COMAPNY
<b>Allegations:</b>	CLIENT HAS EXPRESSED A GENERAL DISSATISFACTION WITH UNSPECIFIED INVESTMENTS
<b>Product Type:</b>	Other: UNSPECIFIED
<b>Alleged Damages:</b>	\$5,000.00
<b>Alleged Damages Amount Explanation (if amount not exact):</b>	DAMAGES ARE NOT YET SPECIFIED AND CANNOT YET BE ESTIMATED
<b>Is this an oral complaint?</b>	No
<b>Is this a written complaint?</b>	Yes
<b>Is this an arbitration/CFTC reparation or civil litigation?</b>	No

### Customer Complaint Information

<b>Date Complaint Received:</b>	03/12/2014
<b>Complaint Pending?</b>	No
<b>Status:</b>	Closed/No Action
<b>Status Date:</b>	11/03/2015
<b>Settlement Amount:</b>	

**Individual Contribution****Amount:****Disclosure 2 of 2****Reporting Source:** Individual**Employing firm when activities occurred which led to the complaint:** G.A. REPPLE AND COMPANY**Allegations:**  
WITH REGARD TO A VARIABLE UNIVERSAL LIFE POLICY PURCHASED IN MARCH 1999, THE CUSTOMER ALLEGES THAT HE FELT OUR REPRESENTATIVE MISREPRESENTED THE SECURITY AND DID NOT FOLLOW UP WITH HIM AFTER THE CUSTOMER RECEIVED THE SECURITY. IN ADDITION, THE CUSTOMER IMPLIES THAT HE THOUGHT HE HAD PURCHASED A VARIABLE ANNUITY AND NOT A VARIABLE UNIVERSAL LIFE POLICY. THE CUSTOMER REQUESTS A REFUND OF ALL THE MONIES HE HAS CONTRIBUTED TO THE POLICY ALONG WITH THE STATUTORY INTEREST DUE HIM. THE CUSTOMER HAS CONTRIBUTED \$13,000 TO HIS POLICY.**Product Type:** Insurance**Alleged Damages:** \$13,000.00**Alleged Damages Amount Explanation (if amount not exact):**  
CLIENT IS REQUESTING \$13,000 THAT WAS CONTRIBUTED TO THE POLICY PLUS ANY INTEREST DUE. INTEREST DUE IS TO BE DETERMINED**Is this an oral complaint?** No**Is this a written complaint?** Yes**Is this an arbitration/CFTC reparation or civil litigation?** No**Customer Complaint Information****Date Complaint Received:** 05/03/2005**Complaint Pending?** No**Status:** Denied**Status Date:** 05/10/2005**Settlement Amount:****Individual Contribution Amount:****Broker Statement**

ON THE VARIABLE UNIVERSAL LIFE POLICY AGENT REPORT THERE ARE TWO REPRESENTATIVES LISTED AS CO-AGENTS ON THIS POLICY. AFTER REVIEWING THE DOCUMENTS ASSOCIATED WITH THIS MATTER AND INTERVIEWING BOTH REPRESENTATIVES, THE G.A. REPPLE AND COMPANY COMPLIANCE DEPARTMENT (GARCO COMPLIANCE) FOUND THAT THE CUSTOMER HAD ACKNOWLEDGED NUMEROUS TIMES, BOTH ORALLY AND IN WRITING, THAT HE UNDERSTOOD HE HAD PURCHASED A VARIABLE UNIVERSAL LIFE INSURANCE POLICY AND HAD RECEIVED FOLLOW-UP SERVICE FROM OUR REPRESENTATIVES. BASED UPON THIS, GARCO COMPLIANCE HAS DETERMINED THAT THE CUSTOMER'S ALLEGATIONS ARE COMPLETELY UNFOUNDED. CUSTOMER NOTIFIED BY LETTER ON MAY 10, 2005 THAT FIRM INVESTIGATED THE ALLEGATIONS AND FOUND THEM TO BE WITHOUT



MERIT. CASE CLOSED WITHOUT NO FURTHER ACTION.



## End of Report

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