



## IAPD Report

# MYRON DOWELL MITCHELL

CRD# 2459003

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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

### MYRON DOWELL MITCHELL (CRD# 2459003)

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 **07/14/2025**.

### CURRENT EMPLOYERS

	Firm	CRD#	Registered Since
<b>B</b>	OSAIC WEALTH, INC.	CRD# 23131	06/14/2024
<b>IA</b>	OSAIC WEALTH, INC.	CRD# 23131	06/14/2024

### QUALIFICATIONS

This representative is currently registered in **1** SRO(s) and **14** 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>IA</b>	SECURITIES AMERICA ADVISORS, INC.	110518	Winston Salem, NC	01/05/2004 - 06/14/2024
<b>B</b>	SECURITIES AMERICA, INC.	10205	WINSTON SALEM, NC	12/19/2003 - 06/14/2024
<b>IA</b>	VERAVEST INVESTMENT ADVISORS, INC.	105796	WALNUT COVE, NC	12/31/2001 - 12/19/2003

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?

**No**



## 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 **14** jurisdiction(s) and 1 SRO(s) through his or her employer(s).

### Employment 1 of 1

Firm Name: **OSAIC WEALTH, INC.**  
Main Address: 18700 N. HAYDEN ROAD  
SUITE 255  
SCOTTSDALE, AZ 85255  
Firm ID#: 23131

	Regulator	Registration	Status	Date
<b>B</b>	FINRA	General Securities Representative	Approved	06/14/2024
<b>B</b>	FINRA	Invest. Co and Variable Contracts	Approved	06/14/2024
<b>B</b>	California	Agent	Approved	06/14/2024
<b>B</b>	Colorado	Agent	Approved	06/14/2024
<b>B</b>	Florida	Agent	Approved	06/14/2024
<b>IA</b>	Florida	Investment Adviser Representative	Approved	09/30/2024
<b>B</b>	Georgia	Agent	Approved	06/14/2024
<b>IA</b>	Georgia	Investment Adviser Representative	Approved	06/14/2024
<b>B</b>	Maryland	Agent	Approved	08/29/2024
<b>B</b>	Massachusetts	Agent	Approved	06/14/2024
<b>B</b>	Michigan	Agent	Approved	06/14/2024
<b>B</b>	New Jersey	Agent	Approved	06/14/2024
<b>B</b>	North Carolina	Agent	Approved	06/14/2024



### Qualifications

Regulator	Registration	Status	Date
IA North Carolina	Investment Adviser Representative	Approved	06/14/2024
B Ohio	Agent	Approved	06/14/2024
B Pennsylvania	Agent	Approved	07/14/2025
B South Carolina	Agent	Approved	06/14/2024
B Tennessee	Agent	Approved	06/26/2024
B Virginia	Agent	Approved	06/14/2024

### Branch Office Locations

**OSAIC WEALTH, INC.**  
4622 Country Club Road, Suite 270  
WINSTON SALEM, NC 27104



## 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 0 principal/supervisory exams, 3 general industry/product exams, and 2 state securities law exams.**



#### Principal/Supervisory Exams

Exam	Category	Date
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No information reported.



#### General Industry/Product Exams

Exam	Category	Date
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 Securities Industry Essentials Examination (SIE)	SIE	10/01/2018
 General Securities Representative Examination (S7)	Series 7	03/20/1995
 Investment Company Products/Variable Contracts Representative Examination (S6)	Series 6	02/28/1994

#### State Securities Law Exams

Exam	Category	Date
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 Uniform Investment Adviser Law Examination (S65)	Series 65	05/19/1995
 Uniform Securities Agent State Law Examination (S63)	Series 63	02/28/1994

### PROFESSIONAL DESIGNATIONS

This section details that the representative has reported **0** professional designation(s).

No information reported.



## Registration & Employment History

### PREVIOUSLY REGISTERED WITH THE FOLLOWING FIRMS

This representative held registrations with the following firms:

	Registration Dates	Firm Name	ID#	Branch Location
IA	01/05/2004 - 06/14/2024	SECURITIES AMERICA ADVISORS, INC.	CRD# 110518	Winston Salem, NC
B	12/19/2003 - 06/14/2024	SECURITIES AMERICA, INC.	CRD# 10205	WINSTON SALEM, NC
IA	12/31/2001 - 12/19/2003	VERAVEST INVESTMENT ADVISORS, INC.	CRD# 105796	WALNUT COVE, NC
B	05/11/1994 - 12/19/2003	VERAVEST INVESTMENTS, INC.	CRD# 3960	WORCESTER, MA
B	03/16/1994 - 04/28/1994	INTERSECURITIES, INC.	CRD# 16164	PHILADELPHIA, PA

### 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
06/2024 - Present	OSAIC WEALTH, INC.	REGISTERED REPRESENTATIVE	Y	WINSTON SALEM, NC, United States
08/2011 - Present	MITCHELL WEALTH MANAGEMENT GROUP	FINANCIAL ADVISOR	N	WINSTON-SALEM, NC, United States
08/2011 - Present	MITCHELL WEALTH MANAGEMENT GROUP, LLC DBA INTEGRATED FINANCIAL G	ADVISOR	Y	ATLANTA, GA, United States
09/2010 - Present	NORTH CAROLINA USSA SPORTS	BOARD OF DIRECTORS VOLUNTEER	N	WALNUT COVE, NC, United States
01/1997 - Present	GREENFIELD FAMILY FARMNS	FARM OWNER AND INSURANCE AGENT	N	WALNUT COVE, NC, United States
01/2004 - 06/2024	SECURITIES AMERICA ADVISORS, INC.	INVESTMENT ADVISOR REPRESENTATIVE	Y	WINSTON-SALEM, NC, United States
12/2003 - 06/2024	SECURITIES AMERICA, INC.	REGISTERED REPRESENTATIVE	Y	WINSTON-SALEM, NC, United States
09/2004 - 12/2017	MMD PROPERTIES, LLC	MEMBER / LANDLORD OF COMMERCIAL PROPERTY	N	WINSTON-SALEM, NC, United States



## Registration & Employment History



### 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.

\*\*\*MITCHELL WEALTH MANAGEMENT GROUP, LLC DBA PRESIDENT 95% TIME SPENT

\*\*\*GREENFIELD FAMILY FARMS, LLC

POSITION: Owner NATURE: GREENFIELD FAMILY FARMS, LLC

Hunting Lease to Mitchell Wealth Management Group, LLC; growth of timber; land lease to local farmer for row crops

INVESTMENT RELATED: No NUMBER OF HOURS: 24 SECURITIES TRADING HOURS: 2 START DATE: 03/28/2012

ADDRESS: 1662 Watts Rd, Walnut Cove NC 27052 DESCRIPTION: 100% Owner. Farm land and equipment upkeep.

Management of leases, income, expenses and planning future leases and crops

\*\*\*COMMONWEALTH

POSITION: servicing rep NATURE: COMMONWEALTH LIFE ANNUITY AND LIFE INSURANCE COMPA VARIABLE ANNUITIES

VARIABLE UNIVERSAL LIFE INSURA REGISTERED REP 45% TIME SPENT INVESTMENT RELATED: Yes NUMBER OF

HOURS: 10 SECURITIES TRADING HOURS: 10 START DATE: 06/01/1994 ADDRESS: 20 Guest Street, Brighton MA 02135

DESCRIPTION: Servicing existing clients and receive trail commissions from a legacy book of Commonwealth variable annuity and variable life book of business SAI granted an exception to this book of business when I joined SAI in 2003

\*\*\*SAA

POSITION: IAR NATURE: SECURITIES AMERICA ADVISORS, INC, SALE OF SECURITIES APPROVED BY SAI, INC- REGISTERED INVESTMENT ADVISORY - IAR - INVESTMENT RELATED - START DATE: 12/2003 - LOCATED AT 514 S.

STRATFORD RD STE 305, WINSTON SALEM, NC 27103 INVESTMENT RELATED: Yes NUMBER OF HOURS: 1000

SECURITIES TRADING HOURS: 800 START DATE: 12/01/2003 ADDRESS: 514 South Stratford Rd, Suite 305, Winston Salem NC 27103 DESCRIPTION: Fee based money management, TAMPs, Fee based planning, Managed Ops, FAP

\*\*\*MITCHELL WEALTH MANAGEMENT GROUP, LLC

POSITION: Owner NATURE: Fixed Insurance Business INVESTMENT RELATED: No NUMBER OF HOURS: 50 SECURITIES

TRADING HOURS: 2 START DATE: 04/01/2003 ADDRESS: 4622 Country Club Rd, Suite 270, Winston Salem NC 27104

DESCRIPTION: As an NC Life, Health and LTC agent; to offer fixed insurance products to clients and prospects.





## End of Report

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