



IAPD Report

JERRY ROBERT CITARELLA

CRD# 2652683

<u>Section Title</u>	<u>Page(s)</u>
Report Summary	1
Qualifications	2 - 3
Registration and Employment History	4 - 5
Disclosure Information	6



When communicating online or investing with any professional, make sure you know who you're dealing with. [Imposters](#) might link to sites like BrokerCheck from [phishing](#) or similar scam websites, or through [social media](#), trying to steal your personal information or your money.

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

JERRY ROBERT CITARELLA (CRD# 2652683)

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 **03/04/2026**.

CURRENT EMPLOYERS

	Firm	CRD#	Registered Since
IA	PROSPERITAS FINANCIAL, LLC	CRD# 315768	08/31/2021

QUALIFICATIONS

This representative is currently registered in **0** SRO(s) and **1** 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	NEXT FINANCIAL GROUP, INC.	46214	VALENCIA, CA	12/03/2007 - 04/25/2022
IA	NEXT FINANCIAL GROUP, INC.	46214	VALENCIA, CA	12/03/2007 - 04/25/2022
IA	PARK AVENUE SECURITIES LLC	46173	VALENCIA, CA	08/24/2006 - 12/04/2007

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
Criminal	1



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 **1** jurisdiction(s) and **0** SRO(s) through his or her employer(s).

Employment 1 of 1

Firm Name: **PROSPERITAS FINANCIAL, LLC**

Main Address: 25060 AVENUE STANFORD
SUITE 100
VALENCIA, CA 91355

Firm ID#: 315768

	Regulator	Registration	Status	Date
	California	Investment Adviser Representative	Approved	08/31/2021

Branch Office Locations

PROSPERITAS FINANCIAL, LLC
25060 AVENUE STANFORD
SUITE 100
VALENCIA, CA 91355



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

Principal/Supervisory Exams

	Exam	Category	Date
	General Securities Principal Examination (S24)	Series 24	03/03/2008
	Municipal Fund Securities Principal Examination (S51)	Series 51	02/19/2008

General Industry/Product Exams

	Exam	Category	Date
	Securities Industry Essentials Examination (SIE)	SIE	10/01/2018
	General Securities Representative Examination (S7)	Series 7	08/02/2000
	Investment Company Products/Variable Contracts Representative Examination (S6)	Series 6	10/17/1995

State Securities Law Exams

	Exam	Category	Date
	 Uniform Combined State Law Examination (S66)	Series 66	08/01/2001
	 Uniform Securities Agent State Law Examination (S63)	Series 63	09/18/1995

PROFESSIONAL DESIGNATIONS

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

No information reported.

Only professional designations listed in Question 8 of the Form U4 will appear in this section if the appropriate box is checked and verified by the issuing organization at the time of the filing. Learn more about eligible designations at [IARD](#) and [NASAA](#).



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	12/03/2007 - 04/25/2022	NEXT FINANCIAL GROUP, INC.	CRD# 46214	VALENCIA, CA
IA	12/03/2007 - 04/25/2022	NEXT FINANCIAL GROUP, INC.	CRD# 46214	VALENCIA, CA
IA	08/24/2006 - 12/04/2007	PARK AVENUE SECURITIES LLC	CRD# 46173	VALENCIA, CA
B	08/21/2006 - 12/04/2007	PARK AVENUE SECURITIES LLC	CRD# 46173	VALENCIA, CA
IA	03/16/2004 - 08/17/2006	AMERITAS INVESTMENT CORP	CRD# 14869	VALENCIA, CA
B	12/16/2003 - 08/17/2006	AMERITAS INVESTMENT CORP.	CRD# 14869	VALENCIA, CA
B	03/20/1998 - 12/17/2003	NEW ENGLAND SECURITIES	CRD# 615	NEW YORK, NY
B	10/18/1995 - 08/30/1997	JOHN HANCOCK DISTRIBUTORS, INC.	CRD# 468	BOSTON, MA
B	10/18/1995 - 05/01/1997	JOHN HANCOCK MUTUAL LIFE INSURANCE COMPANY	CRD# 5181	BOSTON, MA

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
08/2021 - Present	Prosperitas Financial, LLC	Investment Advisor Representative	Y	Valencia, CA, United States
12/2007 - Present	NEXT FINANCIAL GROUP INC	REGISTERED REPRESENTATIVE	Y	VALENCIA, CA, 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.

1) INFINITY WEALTH MANAGEMENT



Registration & Employment History



OTHER BUSINESS ACTIVITIES

POSITION: owner NATURE: DBA INVESTMENT RELATED: Yes NUMBER OF HOURS: 120 SECURITIES TRADING HOURS: 20 START DATE: 12/01/2007

ADDRESS: 23734 Valencia Blvd., Suite 301, Valencia CA 91355

DESCRIPTION: Provide Securities and Investment Advisory Services

2) INFINITY WEALTH MANAGEMENT

POSITION: AGENT NATURE: INSURANCE-LIFE/HEALTH AND FIXED ANNUITIES INVESTMENT RELATED: No NUMBER OF HOURS: 20 SECURITIES TRADING HOURS: 15 START DATE: 12/01/2007

ADDRESS: 23734 Valencia Blvd., # 301, Valencia CA 91355

DESCRIPTION: Providing insurance based solutions to consumers

3) PROSPERITAS FINANCIAL

POSITION: Registered Representative NATURE: DBA INVESTMENT RELATED: Yes NUMBER OF HOURS: 160 SECURITIES TRADING HOURS: 20 START DATE: 10/01/2020

ADDRESS: 25060 Avenue Stanford, suite 100, Valencia CA 91355, United States

DESCRIPTION: I am a representative of this OSJ office using the DBA

4) PROSPERITAS FINANCIAL

POSITION: Agent NATURE: Insurance INVESTMENT RELATED: No NUMBER OF HOURS: 30 SECURITIES TRADING HOURS: 30 START DATE: 10/26/2020

ADDRESS: 25060 Avenue Stanford, Suite 100, Valencia CA 91355, United States

DESCRIPTION: Providing insurance based solutions for clients as an agent.

5) PROSPERITAS FINANCIAL, LLC.: Investment Advisor Representative NATURE: Independent Registered Investment Adviser I-RIA INVESTMENT RELATED: Yes NUMBER OF HOURS: 160 SECURITIES TRADING HOURS: 120 START DATE: 08/30/2021

ADDRESS: 25060 AVENUE STANFORD, SUITE 100, VALENCIA, CA 91355, United States DESCRIPTION: Advisory services as an Investment Advisory Representative through Prosperitas Financial, LLC.



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
Criminal	1

Criminal

This disclosure event involves a criminal charge against the Investment Adviser Representative that has resulted in a dismissal, plea, acquittal or conviction. The criminal matter may relate to any felony or certain misdemeanor offenses (e.g., bribery, perjury, forgery, counterfeiting, extortion, fraud, wrongful taking of property).

Disclosure 1 of 1

Reporting Source:	Individual
Organization Name (if charge(s) were brought against an organization over which individual exercised control):	N/A
Court Details:	THE MUNICIPAL COURT OF L.A. - SAN FERNANDO JUDICIAL DISTRICT COUNTY OF LOS ANGELES, STATE OF CALIFORNIA NO. 87F10708
Charge Date:	11/06/1987
Charge Details:	THEFT 1. 2 COUNTS 2. BOTH MISD 3. COUNT 1 - GUILTY; COUNT 2 - DISMISSAL/PROBATION 4. N/A
Felony?	No
Current Status:	Final
Status Date:	03/07/1988
Disposition Details:	A. DISMISSED; B. 3/07/1988; C. FINED; D. RELEASED ON OWN RECOGNIZANCE; E. 3/07/1988; F. \$285.00; G. 3/07/1988, RECEIPT #70602.
Broker Statement	I HAD GONE TO EAT WITH A FRIEND WHO SAID HE WOULD "TAKE CARE" OF THE BILL. THERE WAS A LINE TO PAY SO I WENT OUTSIDE TO WAIT. HE CAME RUSHING OUT, AND NOT KNOWING WHY HE WAS IN A HURRY, I FOLLOWED. I SOON FOUND OUT THAT HE DID NOT PAY THE BILL WHEN THE MANAGER CAME RUNNING OUT. THERE HAPPENED TO BE A POLICE CAR DRIVING BY AND WE WERE ARRESTED. HE LATER ADMITTED IN COURT THAT I HAD NO KNOWLEDGE OF WHAT WAS HAPPENING HOWEVER I STILL HAD TO PAY THE FINE.



End of Report

This page is intentionally left blank.