



## IAPD Report

# KELLY GENE BURKE

CRD# 2768537

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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

### KELLY GENE BURKE (CRD# 2768537)

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 **05/05/2026**.

### CURRENT EMPLOYERS

	Firm	CRD#	Registered Since
<b>IA</b>	INTEGRATED FINANCIAL STRATEGIES, LLC	CRD# 165007	09/19/2012
<b>B</b>	FORTUNE FINANCIAL SERVICES, INC.	CRD# 42150	12/02/2025
<b>IA</b>	EXODUS WEALTH, LLC	CRD# 174328	02/04/2026

### QUALIFICATIONS

This representative is currently registered in **1** SRO(s) and **50** 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>	FINANCIAL PLANNING SERVICES, INC.	311146	FORT LAUDERDALE, FL	06/09/2021 - 12/31/2025
<b>IA</b>	KESTRA ADVISORY SERVICES, LLC	283330	AUSTIN, TX	06/27/2025 - 11/03/2025
<b>B</b>	KESTRA INVESTMENT SERVICES, LLC	42046	Fort Lauderdale, FL	06/27/2025 - 11/03/2025

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
Customer Dispute	1



## Report Summary



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

### Employment 1 of 3

Firm Name: **FORTUNE FINANCIAL SERVICES, INC.**  
Main Address: 3582 BROADHEAD ROAD  
SUITE 202  
MONACA, PA 15061  
Firm ID#: 42150

	Regulator	Registration	Status	Date
<b>B</b>	FINRA	General Securities Representative	Approved	12/02/2025
<b>B</b>	FINRA	Invest. Co and Variable Contracts	Approved	12/02/2025
<b>B</b>	Alabama	Agent	Approved	04/10/2026
<b>B</b>	Alaska	Agent	Approved	04/13/2026
<b>B</b>	Arizona	Agent	Approved	05/05/2026
<b>B</b>	Arkansas	Agent	Approved	04/15/2026
<b>B</b>	California	Agent	Approved	02/27/2026
<b>B</b>	Colorado	Agent	Approved	04/13/2026
<b>B</b>	Connecticut	Agent	Approved	04/10/2026
<b>B</b>	Delaware	Agent	Approved	04/10/2026
<b>B</b>	District of Columbia	Agent	Approved	04/14/2026
<b>B</b>	Florida	Agent	Approved	12/03/2025
<b>B</b>	Georgia	Agent	Approved	04/13/2026



### Qualifications

Regulator	Registration	Status	Date
B Idaho	Agent	Approved	04/13/2026
B Illinois	Agent	Approved	04/14/2026
B Indiana	Agent	Approved	04/13/2026
B Iowa	Agent	Approved	04/10/2026
B Kansas	Agent	Approved	04/10/2026
B Kentucky	Agent	Approved	04/13/2026
B Louisiana	Agent	Approved	04/13/2026
B Maine	Agent	Approved	04/10/2026
B Maryland	Agent	Approved	03/02/2026
B Massachusetts	Agent	Approved	04/13/2026
B Michigan	Agent	Approved	03/03/2026
B Minnesota	Agent	Approved	04/13/2026
B Mississippi	Agent	Approved	04/20/2026
B Missouri	Agent	Approved	04/13/2026
B Montana	Agent	Approved	04/14/2026
B Nebraska	Agent	Approved	04/17/2026
B Nevada	Agent	Approved	04/13/2026
B New Hampshire	Agent	Approved	04/14/2026
B New Jersey	Agent	Approved	04/10/2026



### Qualifications

Regulator	Registration	Status	Date
<b>B</b> New Mexico	Agent	Approved	04/13/2026
<b>B</b> New York	Agent	Approved	04/10/2026
<b>B</b> North Carolina	Agent	Approved	12/04/2025
<b>B</b> North Dakota	Agent	Approved	04/13/2026
<b>B</b> Ohio	Agent	Approved	03/02/2026
<b>B</b> Oklahoma	Agent	Approved	04/14/2026
<b>B</b> Oregon	Agent	Approved	04/26/2026
<b>B</b> Pennsylvania	Agent	Approved	12/08/2025
<b>B</b> Rhode Island	Agent	Approved	04/13/2026
<b>B</b> South Carolina	Agent	Approved	04/15/2026
<b>B</b> South Dakota	Agent	Approved	04/10/2026
<b>B</b> Tennessee	Agent	Approved	04/13/2026
<b>B</b> Texas	Agent	Approved	03/03/2026
<b>B</b> Utah	Agent	Approved	04/13/2026
<b>B</b> Vermont	Agent	Approved	04/10/2026
<b>B</b> Virginia	Agent	Approved	04/14/2026
<b>B</b> Washington	Agent	Approved	04/13/2026
<b>B</b> West Virginia	Agent	Approved	04/13/2026
<b>B</b> Wisconsin	Agent	Approved	03/04/2026



### Qualifications

Regulator	Registration	Status	Date
<b>B</b> Wyoming	Agent	Approved	04/13/2026

### Branch Office Locations

2400 E Commercial Blvd  
 Suite 706  
 Fort Lauderdale, FL 33308

2400 E Commercial Blvd  
 Suite 706  
 Fort Lauderdale, FL 33308

### Employment 2 of 3

Firm Name: **EXODUS WEALTH, LLC**  
 Main Address: 2400 EAST COMMERCIAL BOULEVARD  
 SUITE 706  
 FORT LAUDERDALE, FL 33308  
 Firm ID#: 174328

Regulator	Registration	Status	Date
<b>IA</b> Florida	Investment Adviser Representative	Approved	02/04/2026

### Branch Office Locations

**EXODUS WEALTH, LLC**  
 Pompano Beach, FL

### Employment 3 of 3

Firm Name: **INTEGRATED FINANCIAL STRATEGIES, LLC**  
 Main Address: 2400 EAST COMMERCIAL BOULEVARD  
 SUITE 706  
 FORT LAUDERDALE, FL 33308  
 Firm ID#: 165007

Regulator	Registration	Status	Date
<b>IA</b> Florida	Investment Adviser Representative	Approved	08/07/2020
<b>IA</b> North Carolina	Investment Adviser Representative	Approved	10/02/2012
<b>IA</b> Texas	Investment Adviser Representative	Restricted Approval	09/19/2012



## Qualifications

### Branch Office Locations

**INTEGRATED FINANCIAL STRATEGIES, LLC**  
Pompano, FL



## 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	12/23/2003
 Investment Company Products/Variable Contracts Representative Examination (S6)	Series 6	07/09/1996

#### State Securities Law Exams

Exam	Category	Date
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 Uniform Investment Adviser Law Examination (S65)	Series 65	05/31/2001
 Uniform Securities Agent State Law Examination (S63)	Series 63	07/09/1996

### 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	06/09/2021 - 12/31/2025	FINANCIAL PLANNING SERVICES, INC.	CRD# 311146	FORT LAUDERDALE, FL
IA	06/27/2025 - 11/03/2025	KESTRA ADVISORY SERVICES, LLC	CRD# 283330	AUSTIN, TX
B	06/27/2025 - 11/03/2025	KESTRA INVESTMENT SERVICES, LLC	CRD# 42046	Fort Lauderdale, FL
B	09/05/2014 - 06/30/2025	FORTUNE FINANCIAL SERVICES, INC.	CRD# 42150	Charlotte, NC
B	09/17/2012 - 09/09/2014	CAPITAL GUARDIAN, LLC	CRD# 137919	CHARLOTTE, NC
B	10/11/2007 - 09/27/2012	LPL FINANCIAL LLC	CRD# 6413	CHARLOTTE, NC
IA	10/11/2007 - 09/27/2012	LPL FINANCIAL LLC	CRD# 6413	CHARLOTTE, NC
B	06/01/2005 - 10/29/2007	AXA ADVISORS, LLC	CRD# 6627	CHARLOTTE, NC
IA	06/01/2005 - 10/29/2007	AXA ADVISORS, LLC	CRD# 6627	CHARLOTTE, NC
IA	01/08/2003 - 06/01/2005	MONY SECURITIES CORPORATION	CRD# 4386	CHARLOTTE, NC
B	01/03/2003 - 06/01/2005	MONY SECURITIES CORPORATION	CRD# 4386	NEW YORK, NY
IA	12/31/2001 - 01/02/2003	NEW ENGLAND SECURITIES CORPORATION	CRD# 615	CHARLOTTE, NC
B	01/26/2000 - 01/02/2003	NEW ENGLAND SECURITIES	CRD# 615	NEW YORK, NY
B	07/10/1996 - 02/15/2000	AXA ADVISORS, LLC	CRD# 6627	NEW YORK, NY
B	07/10/1996 - 01/05/2000	THE EQUITABLE LIFE ASSURANCE SOCIETY OF THE UNITED STATES	CRD# 4039	NEW YORK, NY



## Registration & Employment History

### 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
12/2025 - Present	Exodus Wealth Management	Investment Adviser Representative	Y	Ft. Lauderdale, FL, United States
12/2025 - Present	Fortune Financial Services, Inc.	Representative	Y	Ft. Lauderdale, FL, United States
09/2012 - Present	Integrated Financial Strategies	Financial Advisor	Y	Charlotte, NC, United States
10/2020 - 12/2025	Financial Planning Services, Inc.	Owner	Y	Raleigh, NC, United States
06/2025 - 11/2025	Kestra Advisory Services LLC	Investment Advisor	Y	Fort Lauderdale, FL, United States
06/2025 - 11/2025	Kestra Investment Services LLC	Registered Representative	Y	Fort Lauderdale, FL, United States
09/2014 - 06/2025	FORTUNE FINANCIAL SERVICES, INC.	REGISTERED REPRESENTATIVE	Y	NEW BRIGHTON, PA, United States
09/2012 - 06/2025	INTEGRATED FINANCIAL STRATEGIES	FINANCIAL ADVISOR	Y	CHARLOTTE, NC, 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.

Name: INTEGRATED FINANCIAL STRATEGIES,LLC POSITION: Owner-President NATURE: Investment advisory services through an independent outside RIA INVESTMENT RELATED: Yes # OF HOURS: 10 SECURITIES TRADING HOURS: 10 START DATE: 04/30/2025 ADDRESS: 15720 Brixham Hill Ave Ste 300, Charlotte NC 28277, United States DESCRIPTION: Manage the ongoing operations, run billings, disburse advisory fees to IARs quarterly, Manage compliance via outside vendor(ACA)

Name: PROSPERITY WEALTH MANAGEMENT, INC; POSITION: IAR, NATURE: Investment advisory services; INVESTMENT RELATED: Yes # OF HOURS: 160 SECURITIES TRADING HOURS: 130 START DATE: 12/2025 DESCRIPTION: IAR; ADDRESS: San Ramon, CA 94583



## 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
Customer Dispute	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

<b>Reporting Source:</b>	Individual
<b>Court Details:</b>	STATE OF NORTH CAROLINA MECKLENBURG COUNTY, FILE NUMBER 02CR246696-01
<b>Charge Date:</b>	10/14/2002
<b>Charge Details:</b>	ONE CHARGE, G.S. 20-30(1)- DISPLAY REVOKED LICENSE KNOWN TO BE REVOKED, MISDEMEANOR, DISMISSED.
<b>Felony?</b>	No
<b>Current Status:</b>	Final
<b>Status Date:</b>	10/25/2002
<b>Disposition Details:</b>	CHARGE WAS DISMISSED.



### 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 1

**Reporting Source:** Firm

**Employing firm when activities occurred which led to the complaint:** EQUITABLE LIFE

**Allegations:** CLIENT ALLEGES THE AGENT PROVIDED HER WITH FALSE INFORMATION DURING THE SALE OF TWO VARIABLE ANNUITY CONTRACTS. DAMAGES ARE UNSPECIFIED.

**Product Type:** Annuity(ies) - Variable

**Alleged Damages:** \$0.00

#### Customer Complaint Information

**Date Complaint Received:** 06/27/2001

**Complaint Pending?** No

**Status:** Closed/No Action

**Status Date:** 03/15/2002

**Settlement Amount:**

**Individual Contribution Amount:**

**Firm Statement** EQUITABLE AGREED TO WAIVE THE CUSTOMERS SURRENDER CHARGES,BUT THE CUSTOMER DID NOT ACCEPT THE FIRMS OFFER.SUBSEQUENTLY, THE CASE WAS CLOSED WITHOUT FURTHER ACTION.

**Reporting Source:** Individual

**Employing firm when activities occurred which led to the complaint:** EQUITABLE LIFE

**Allegations:** CLIENT ALLEGES THE AGENT PROVIDED HER WITH FALSE INFORMATION DURING THE SALE OF TWO VARIABLE ANNUITY CONTRACTS. DAMAGES ARE UNSPECIFIED.

**Product Type:** Annuity(ies) - Variable

**Alleged Damages:** \$0.00

#### Customer Complaint Information

**Date Complaint Received:** 06/27/2001

**Complaint Pending?** No

**Status:** Closed/No Action



**Status Date:** 12/17/2002

**Settlement Amount:**

**Individual Contribution  
Amount:**



## End of Report

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