



IAPD Report

Jeffrey Scott Beyer Jr.

CRD# 5731082

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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

Jeffrey Scott Beyer Jr. (CRD# 5731082)

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 **02/26/2026**.

CURRENT EMPLOYERS

Firm	CRD#	Registered Since
IA PALADIN RETIREMENT ADVISORS	CRD# 333662	02/11/2025

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
IA AE WEALTH MANAGEMENT, LLC	282580	Newton, PA	02/28/2019 - 10/01/2024
B USA FINANCIAL SECURITIES CORPORATION 103857		Newtown, PA	01/20/2017 - 03/01/2019
IA USA FINANCIAL SECURITIES CORPORATION 103857		Newtown, PA	01/20/2017 - 03/01/2019

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	1
Termination	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: **PALADIN RETIREMENT ADVISORS**
Main Address: 532 DURHAM RD
STE 101
NEWTOWN, PA 18940
Firm ID#: 333662

Regulator	Registration	Status	Date
IA Pennsylvania	Investment Adviser Representative	Approved	02/11/2025

Branch Office Locations

PALADIN RETIREMENT ADVISORS
532 DURHAM RD
STE 101
NEWTOWN, PA 18940



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, 2 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
 Investment Company Products/Variable Contracts Representative Examination (S6)	Series 6	11/10/2009

State Securities Law Exams

Exam	Category	Date
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 Uniform Investment Adviser Law Examination (S65)	Series 65	11/28/2009
 Uniform Securities Agent State Law Examination (S63)	Series 63	11/21/2009

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	02/28/2019 - 10/01/2024	AE WEALTH MANAGEMENT, LLC	CRD# 282580	Newton, PA
B	01/20/2017 - 03/01/2019	USA FINANCIAL SECURITIES CORPORATION	CRD# 103857	Newtown, PA
IA	01/20/2017 - 03/01/2019	USA FINANCIAL SECURITIES CORPORATION	CRD# 103857	Newtown, PA
B	03/06/2014 - 12/31/2016	UNITED PLANNERS' FINANCIAL SERVICES OF AMERICA A LIMITED PARTNER	CRD# 20804	NEWTON, PA
IA	03/06/2014 - 12/31/2016	UNITED PLANNERS' FINANCIAL SERVICES OF AMERICA A LIMITED PARTNER	CRD# 20804	NEWTON, PA
IA	11/30/2009 - 03/07/2014	BCG SECURITIES, INC.	CRD# 70	NEWTOWN, PA
B	11/11/2009 - 03/07/2014	BCG SECURITIES, INC.	CRD# 70	NEWTOWN, 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
02/2026 - Present	Paladin Insurance Advisors	Insurance Agent	Y	Washington Crossing, PA, United States
11/2024 - Present	JSBJ Enterprises, Inc. dba Paladin Retirement Advisors	Chief Compliance Officer/Investment Advisor Representative	Y	Newtown, PA, United States
10/2009 - Present	JSBJ Enterprises, Inc.	President	Y	Newtown, PA, United States
10/2009 - Present	Jeffrey Beyer, Sole Proprietor	Insurance Agent	Y	NEWTOWN, PA, United States
02/2019 - 10/2024	AE WEALTH MANAGEMENT, LLC	INVESTMENT ADVISER REPRESENTATIVE	Y	TOPEKA, KS, United States
01/2003 - 03/2023	JEFFREY BEYER RENTAL PROPERTIES	OWNER/LANDLORD	N	WASHINGTON CROSSING, PA, United States



Registration & Employment History

EMPLOYMENT HISTORY

Employment Dates	Employer Name	Position	Investment Related	Employer Location
01/2017 - 03/2019	USA FINANCIAL SECURITIES CORPORATION	INVESTMENT ADVISER REPRESENTATIVE	Y	ADA, MI, United States
01/2017 - 03/2019	USA FINANCIAL SECURITIES CORPORATION	REGISTERED REPRESENTATIVE	Y	ADA, MI, United States
03/2014 - 12/2016	UNITED PLANNERS' FINANCIAL SERVICES OF AMERICA	REGISTERED REPRESENTATIVE	Y	NEWTOWN, PA, United States
03/2014 - 12/2016	UNITED PLANNERS' FINANCIAL SERVICES OF AMERICA	INVESTMENT ADVISER REPRESENTATIVE	Y	NEWTOWN, PA, 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.) Jeffrey Beyer, Sole Proprietor; INVESTMENT-RELATED; NEWTOWN, PA ; INSURANCE SALES AND SERVICE; Insurance Agent; 10/2009; 20 HOURS PER MONTH; 20 HOURS PER MONTH during securities trading hours; SALES OF FIXED INSURANCE PRODUCTS
- 2.)Paladin Insurance Advisors; INVESTMENT-RELATED; NEWTOWN, PA ; INSURANCE SALES AND SERVICE; Insurance Agent; 02/2026; 20 HOURS PER MONTH; 20 HOURS PER MONTH during securities trading hours; SALES OF FIXED INSURANCE PRODUCTS



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	1
Termination	1

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: Individual

Employing firm when activities occurred which led to the complaint: USA Financial Securities Corporation

Allegations: Customer alleges that representative's failure to mail alternative investment options caused her to maintain her investment in a variable annuity. Client emailed representative on January 28, 2018, for updated information regarding her variable annuity. Representative responded and offered to meet with the customer to discuss her investment. Customer declined meeting and demanded that representative mail alternative investment options. Representative declined to provide alternative investment options in mail, and in various email correspondence of February 14, 2018 answered questions regarding accounts, and again offered to speak with client. After the exchange, Customer did not contact representative until June 19, 2018 requesting to sell her annuity. On June 28, 2018 customer alleged that she was damaged as the result of the representative's failure to mail investment alternatives. Customer claims market loss, contract fees, and rider charges as damages. Customer repeated allegations, and also alleged poor customer service because representative did not create projections on future performance of variable annuity and fixed annuity accounts, in an email sent July 2, 2018.

Product Type: Annuity-Fixed
Annuity-Variable

Alleged Damages: \$25,000.00

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: 06/28/2018

Complaint Pending? No

Status: Denied

Status Date: 07/10/2018

Settlement Amount:

Individual Contribution Amount:

Broker Statement

Representative vehemently denies the allegations as stated by the customer. The representative did not sell this variable annuity to the customer, and took the contract on for servicing after her prior financial adviser left the industry. The Representative offered to meet with the customer to discuss alternative investment options, or to speak with the customer on the phone on multiple occasions. Representative specifically denied customer's request to mail unspecified investment options. The customer did not contact the representative until nearly four months after his last offer, only to ultimately file the instant complaint. It is the representative's position that the customer's claims are not well grounded in fact, and customer's requests exceed the scope of their relationship.



Termination

This disclosure event involves a situation where the Investment Adviser Representative voluntarily resigned, was discharged or was permitted to resign after allegations were made that accused the Investment Adviser Representative of violating investment-related statutes, regulations, rules or industry standards of conduct; fraud or the wrongful taking of property; or failure to supervise in connection with investment-related statutes, regulations, rules or industry standards of conduct.

Disclosure 1 of 1

Reporting Source: Firm
Firm Name: AE Wealth Management, LLC
Termination Type: Discharged
Termination Date: 09/30/2024
Allegations: Mr. Beyer was terminated from AE Wealth Management ("AEWM") for violating the AEWM Compliance Policy Manual.
Product Type: No Product

Reporting Source: Individual
Firm Name: AE Wealth Management, LLC
Termination Type: Discharged
Termination Date: 09/30/2024
Allegations: Mr. Beyer was terminated from AE Wealth Management ("AEWM") for violating the AEWM Compliance Policy Manual.
Product Type: No Product



End of Report

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