

*This brochure supplement provides information about David Joseph Perrotto that supplements the Bright Futures Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact David Joseph Perrotto if you did not receive Bright Futures Wealth Management, LLC's brochure or if you have any questions about the contents of this supplement.*

*Additional information about David Joseph Perrotto is also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).*

# **Bright Futures Wealth Management, LLC**

## **Form ADV Part 2B – Individual Disclosure Brochure**

*for*

**David Joseph Perrotto**

Personal CRD Number: 4960240

Investment Adviser Representative

Bright Futures Wealth Management, LLC  
1630 Empire Blvd., Suite 100  
Webster, NY 14580  
(718) 551-7131  
[dave@perrottowealth.com](mailto:dave@perrottowealth.com)

UPDATED: 11/07/2022

## Item 2: Educational Background and Business Experience

**Name:** David Joseph Perrotto      **Born:** 1984

### **Educational Background and Professional Designations:**

#### **Education:**

David Joseph Perrotto has not received any higher education degrees after high school.

#### **Business Background:**

01/2018 - Present	Investment Adviser Representative Bright Futures Wealth Management, LLC
03/2011 - Present	Founder and Financial Advisor Perrotto Private Wealth

## Item 3: Disciplinary Information

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

## Item 4: Other Business Activities

David Joseph Perrotto is a registered representative. From time to time, he will offer clients advice or products from this activity. Clients should be aware that these services pay a commission and involve a possible conflict of interest, as commissionable products can conflict with the fiduciary duties of a registered investment adviser. Bright Futures Wealth Management, LLC always acts in the best interest of the client; including in the sale of commissionable products to advisory clients. Clients are in no way required to utilize the services any representative of Bright Futures Wealth Management, LLC in such individual's outside capacity.

David Joseph Perrotto is a licensed insurance agent. From time to time, he will offer clients advice or products from this activity. Clients should be aware that these services pay a commission and involve a possible conflict of interest, as commissionable products can conflict with the fiduciary duties of a registered investment adviser. Bright Futures Wealth Management, LLC always acts

in the best interest of the client; including in the sale of commissionable products to advisory clients. Clients are in no way required to implement the plan through any representative of Bright Futures Wealth Management, LLC in their capacity as a licensed insurance agent.

### **Item 5: Additional Compensation**

David Joseph Perrotto does not receive any economic benefit from any person, company, or organization, other than Bright Futures Wealth Management, LLC in exchange for providing clients advisory services through Bright Futures Wealth Management, LLC.

### **Item 6: Supervision**

As a representative of Bright Futures Wealth Management, LLC, David Joseph Perrotto is supervised by Craig LeFeber, the firm's Chief Compliance Officer. Craig LeFeber is responsible for ensuring that David Joseph Perrotto adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Craig LeFeber is (585) 305-8518.