

Item 1. Cover Page for Part 2B of  
Form ADV: Brochure Supplement  
June 2026



**MERIT**  
Financial Advisors

**MERIT FINANCIAL ADVISORS**

This Brochure Supplement provides information about our advisors at Merit Financial Group, LLC, dba Merit Financial Advisors, that supplements our firm Brochure. You should have received a copy of that brochure. Please contact the Compliance Department if you did not receive our firm's Brochure or if you have any questions about the contents of this Supplement by telephone (678) 867-7050 or email at [compliance@meritfa.com](mailto:compliance@meritfa.com). Additional information about each advisor is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

1160 Fond Du Lac Ave  
Sheboygan Falls, WI 53085

**(920) 467-4909**

Peter Mersberger  
Joshua Mersberger  
Zachary Mersberger  
Paul Jochimsen  
Donald Hammond  
William Morrison  
Anthony Hellenbrand  
Andrew Schroeder  
Mitchell Parker  
Jennifer "Jenny" Antosh  
Bryce Stacey

John Brazier  
Christian Kalnins  
Sydney Thompson  
Joshua Preiss  
Andrea Zoeller  
Austin Summers  
Eric Sajdak  
Casey Mahoney  
Philip "Phil" Ferrara  
Alex Paltzer

## Item 2: Educational Background & Business Experience

### **Peter Mersberger**

Born 1958

#### **Educational Background:**

University of Wisconsin – Oshkosh, Bachelor of Business Science/Education

#### **Business Background:**

09/2022 – Present: Merit Financial Advisors; Investment Adviser Representative

08/2024 – Present: Purshe Kaplan Sterling Investments; Registered Representative

09/2022 – 08/2024: LPL Financial; Registered Representative

11/2017 – 09/2022: Cambridge Investment Research Advisors; Investment Adviser Representative

### **Joshua Mersberger**

Born 1987

#### **Educational Background:**

University of Wisconsin – Oshkosh, Bachelor of Science, Finance

#### **Business Background:**

09/2022 – Present: Merit Financial Advisors; Investment Adviser Representative

09/2022 – 04/2024: LPL Financial; Registered Representative

11/2017 – 09/2022: Cambridge Investment Research Advisors; Investment Adviser Representative

### **Zachary Mersberger**

Born 1989

#### **Educational Background:**

University of Wisconsin – Oshkosh, Bachelor of Business Administration in Finance

#### **Business Background:**

08/2022 – Present: Merit Financial Advisors; Investment Adviser Representative

08/2022 – 04/2024: LPL Financial; Registered Representative

11/2017 – 08/2022: Cambridge Investment Research Advisors; Investment Adviser Representative

**Paul Jochimsen**

Born 1961

**Educational Background:**

University of Wisconsin – Madison, Bachelor of Business Administration

University of Wisconsin – Madison, Master of Business Administration

**Business Background:**

09/2022 – Present: Merit Financial Advisors; Investment Adviser Representative

08/2024 – Present: Purshe Kaplan Sterling Investments; Registered Representative

09/2022 – 08/2024: LPL Financial; Registered Representative

02/2019 – 09/2022: Jochimsen Wealth Management LLC; President/Owner/Financial Advisor

**Donald Hammond**

Born 1973

**Educational Background:**

Marquette University, Master of Business Administration

University of Wisconsin – Whitewater, Bachelor of Business Administration in Finance

**Business Background:**

08/2022 – Present: Merit Financial Advisors; Investment Adviser Representative

08/2022 – 04/2024: LPL Financial; Registered Representative

12/2019 – 08/2022: Mersberger Advisory Group, LLC; Principal/Investment Adviser Representative

**William Morrison**

Born 1973

**Educational Background:**

Bradley University, Master's in Accounting

**Business Background:**

08/2022 – Present: Merit Financial Advisors; Investment Adviser Representative

08/2024 – Present: Purshe Kaplan Sterling Investments; Registered Representative

09/2008 – Present: University of Wisconsin – Oshkosh; Accounting/Finance Professor

09/2020 - 08/2022: Cambridge Investment Research Advisors; Investment Adviser Representative

09/2020 - 08/2022: Cambridge Investment Research, Inc.; Registered Representative

**Anthony Hellenbrand**

Born: 1987

**Educational Background:**

Michigan Technological University, Bachelor of Business Administration in Finance

**Business Background:**

04/2025 – Present: Merit Financial Advisors; Regional Vice President, Partner

01/2020 - 04/2025: Safeguard Wealth Management; Advisor, Partner

**Andrew Schroeder**

Born: 1995

**Educational Background:**

University of Wisconsin - La Crosse, Bachelor of Science in Economics & Finance

**Business Background:**

04/2025 – Present: Merit Financial Advisors; Wealth Manager

02/2022 - 04/2025: Safeguard Wealth Management; Senior Advisor

02/2020 - 02/2022: Associated Trust Company; Assistant Vice President,  
Portfolio Manager

**Mitchell Parker**

Born: 1996

**Educational Background:**

Ohio University, Bachelor of Business Administration – Personal Finance

**Business Background:**

04/2025 – Present: Merit Financial Advisors; Wealth Manager

02/2023 - 04/2025: Safeguard Wealth Management; Senior Advisor

05/2019 - 02/2023: Morgan Stanley; Registered Associate

**John Brazier**

Born 1994

**Educational Background:**

University of Wisconsin – Whitewater, Bachelor of Business Administration in Finance

**Business Background:**

08/2022 – Present: Merit Financial Advisors; Investment Adviser Representative

08/2024 – Present: Purshe Kaplan Sterling Investments; Registered Representative

08/2022 – 08/2024: LPL Financial; Registered Representative

09/2019 – 08/2022: Mersberger Financial Group; Investment Adviser Representative

**Christian Kalnins**

Born: 1993

**Educational Background:**

University of Wisconsin-Madison, Bachelor of Science – Personal Finance

**Business Background:**

04/2025 – Present: Merit Financial Advisors; Regional Vice President, Wealth Manager

06/2024 - 04/2025: Safeguard Wealth Management; Senior Advisor

03/2023 - 05/2024: MML Investors Services; Registered Representative

03/2023 - 05/2024: MassMutual Life Insurance Co.; Agent

02/2020 - 03/2022: Robert W. Baird & Co.; Financial Advisor

**Sydney Thompson**

Born 1999

**Educational Background:**

University of Wisconsin - Oshkosh, Bachelor of Business Administration in Finance

**Business Background:**

08/2022 – Present: Merit Financial Advisors; Investment Adviser Representative

08/2024 – Present: Purshe Kaplan Sterling Investments; Registered Representative

08/2022 – 08/2024: LPL Financial; Registered Representative

01/2022 – 08/2022: Cambridge Investment Research Advisors; Investment Adviser Representative

07/2021 – 08/2022: Cambridge Investment Research, Inc.; Registered Representative

01/2021 – 08/2022: Cambridge Investment Research, Inc.; Administrative

01/2021 – 08/2022: Mersberger Financial Group; Investment Adviser Representative

**Joshua Preiss**

Born 1994

**Educational Background:**

University of Wisconsin - Oshkosh, Bachelor of Business Administration in Finance

**Business Background:**

08/2022 – Present: Merit Financial Advisors; Investment Adviser Representative

08/2024 – Present: Purshe Kaplan Sterling Investments; Registered Representative

08/2022 – 08/2024: LPL Financial; Registered Representative

11/2017 – 08/2022: Cambridge Investment Research; Registered Representative

**Andrea Zoeller**

Born 1989

**Educational Background:**

University of Wisconsin – Oshkosh, Bachelor of Business Administration in Finance and Psychology

**Business Background:**

08/2022 – Present: Merit Financial Advisors; Investment Adviser Representative

08/2024 – Present: Purshe Kaplan Sterling Investments; Registered Representative

08/2022 – 08/2024: LPL Financial; Registered Representative

11/2017–08/2022: Cambridge Investment Research Advisors; Investment Adviser Representative

**Austin Summers**

Born 1996

**Educational Background:**

University of Wisconsin – Oshkosh, Bachelor of Business Administration in Finance/Economics

**Business Background:**

09/2022 – Present: Merit Financial Advisors; Investment Adviser Representative

08/2024 – Present: Purshe Kaplan Sterling Investments; Registered Representative

09/2022 – 08/2024: LPL Financial; Registered Representative

05/2019 – 09/2022: Cambridge Investment Research, Inc.; Registered Representative

**Eric Sajdak**

Born: 1994

**Business Background:**

04/2025 – Present: Merit Financial Advisors; Director of Content, Partner

01/2020 - 04/2025: Safeguard Wealth Management; Advisor, Partner

**Casey Mahoney**

Born: 1992

**Educational Background:**

University of Missouri – Columbia, Bachelor of Arts

**Business Background:**

04/2025 – Present: Merit Financial Advisors; Regional Vice President

02/2023 - 04/2025: Safeguard Wealth Management; Senior Advisor

08/2019 - 02/2023: UBS Financial Services Inc.; Client Service Associate

**Philip Ferrara**

Born: 1977

**Educational Background:**

Kutztown University, Bachelor of Arts in Sociology

**Business Background:**

07/2025 – Present: Merit Financial Advisors; Wealth Manager

04/2024 - 07/2025: Scholar Financial Advising, LLC, Associate Financial Advisor

11/2023 - 04/2024: Northwestern Mutual Wealth Management Company; Investment Adviser Rep

10/2023 - 04/2024: Northwestern Mutual Investment Services LLC; Registered Rep

10/2023 - 03/2024: G Thomas Morris; Associate Agent

09/2023 – 10/2023: G Thomas Morris; Agent Assistant

06/2023 – 09/2023: Obsidian Planning Solutions; Paraplanner

02/2017 – 05/2023: Larson Financial Group; Paraplanner

**Jennifer “Jenny” Antosh**

Born: 1990

**Educational Background:**

University of Maryland, College Park. BS, Finance

**Business Background:**

11/2025 – Present: Merit Financial Advisors; Wealth Manager

10/2023 – 08/2025: Tritonpoint Wealth, LLC; Senior Associate, Relationship Manager

08/2021 – 10/2023: Goldman Sachs PFM; Associate, Relationship Manager

**Bryce Stacy**

Born: 1990

**Business Background:**

07/2022 – Present: Merit Financial Advisors; Wealth Advisor

08/2024 – Present: Purshe Kaplan Sterling Investments; Non-Licensed Assistant

09/2022 – 08/2024: LPL Financial LLC; Non-Licensed Assistant

06/2022 – 09/2022: Mersberger Financial; Non-Licensed Assistant

09/2021 – 12/2021: Richard Wick; Associate Agent

### **Item 3: Disciplinary Information**

Merit Financial Group, LLC is required to disclose the facts of any legal or disciplinary events that are material to a client's evaluation of its advisory business or the integrity of management.

There are no legal or disciplinary events material to your evaluation of our advisors to disclose.

### **Item 4: Other Business Activities**

Most of our advisors are also registered representatives Purshe, Kaplan, Sterling Investments ("PKS"), member FINRA/SIPC, as well as licensed to sell insurance products. They may offer securities and products and receive normal and customary commissions as a result of these transactions. This presents a conflict of interest to the extent that they recommend that a client invest in a security or an insurance product that results in a commission being paid to them. To mitigate this potential conflict, our advisors, as fiduciaries, will always put the interests of their clients before their own. Clients are under no obligation to purchase securities or insurance products from our advisors.

Donald Hammond is actively engaged in real estate as a developer, manager, or owner of rental property.

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

We will from time to time receive expense reimbursement for travel and/or marketing expenses from distributors of investment and/or insurance products. Travel expense reimbursements are typically a result of attendance at due diligence and/or investment training events hosted by product sponsors. Marketing expense reimbursements are typically the result of informal expense sharing arrangements in which product sponsors underwrite the costs incurred for marketing such as client appreciation events, advertising, publishing, and seminar expenses. Although receipt of these travel and marketing expense reimbursements are not predicated upon specific sales quotas, the product sponsor reimbursements are typically made by those sponsors for which sales have been made or for which it is anticipated sales will be made. This creates a conflict of interest in that there is an incentive to recommend certain products and investments based on the receipt of this compensation instead of what is in the best interest of our clients. The amount of these expense reimbursements is not considered to be material; further, we attempt to control this conflict by basing investment decisions on the individual needs of our clients.

### **Item 6: Supervision**

Doug Baxley, Chief Compliance Officer, supervises and monitors the activities of our advisors on a regular basis to ensure compliance with our firm's Code of Ethics. Please contact Mr. Baxley if you have any questions about the information in this brochure supplement at (678) 867-7050 or [compliance@meritfa.com](mailto:compliance@meritfa.com)