

Item 1 – Cover Page

Joseph R. Marchese, CFP®

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World Investment Advisors, LLC

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This brochure supplement provides information about Joseph R. Marchese that supplements the World Investment Advisors, LLC brochure. You should have received a copy of that brochure. Please contact us at (888) 201-5488 or by sending an email to Adam.enter@pensionmark.com if you did not receive the World Investment Advisors' brochure or if you have any questions about the contents of this supplement.

Additional information about Joseph R. Marchese is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 - Educational Background and Business Experience

Joseph R. Marchese b. 1958

Educational Background

Baruch College, BS – Economics, 1984

Columbia University – Masters in Education

Certified Financial Planner®, CFP®

Business Experience

Firm

World Investment Advisors, LLC

Financial Planning Concepts of America

Cambridge Investment Research, Inc.

Position

Investment Advisor

Investment Advisor

Registered Rep.

Dates

04/2024 – Present

07/1990 – Present

10/2004 – 05/2007

The CERTIFIED FINANCIAL PLANNER™ (CFP®) designation is issued by the Certified Financial Planner Board of Standards, Inc. after candidates pass the CFP Certification Examination. The examination, administered in 6 hours, includes case studies and client scenarios designed to test one's ability to correctly diagnose financial planning issues and apply one's knowledge of financial planning to real-world circumstances. In addition, certified individuals must complete 30 hours of continuing education every

two years, including two hours on the Code of Ethics and other parts of the Standard of Professional Conduct. As a prerequisite for the CFP Certification Examination, candidates must hold a bachelor's degree (or higher) from an accredited college or university and have at least 6,000 hours of full-time personal financial planning experience. In addition, candidates must complete a CFP-Board registered program. Once the criteria have been met, the adviser is certified for financial planning services in the United States by the Certified Financial Planner Board of Standards, Inc. ("CFP Board"). The Advisor may use CERTIFIED FINANCIAL PLANNER™ professional, CFP professional, and other "CFP Board Certification Marks." The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification.

Item 3 - Disciplinary Information

Investment Advisor Representatives are required to disclose all material facts regarding any legal and disciplinary events that would be material to your evaluation of the representative. For all of the disciplinary history regarding Joseph R. Marchese, we encourage you to independently view his background on the Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov. For the IAPD website, select Investment Adviser Search from the left navigation menu, then select the option for Investment Adviser Representative and enter 1581329 in the field labeled "Individual CRD Number".

Item 4 - Other Business Activities

Advisors are required to disclose other investment related businesses or activities outside of their role of Investment Adviser Representative. Joseph R. Marchese has no outside business activities to disclose at this time.

Item 5 - Additional Compensation

Joseph R. Marchese does not receive compensation for advisory services other than fees paid by the client.

Item 6 - Supervision

Adam Enter is the Chief Compliance Officer and is responsible for supervision of all advisory accounts. He can be reached at (888) 201-5488.

Joseph R. Marchese is required to adhere to World Investment Advisors' processes and procedures as described in the firm's Code of Ethics. In order to monitor the advice that Joseph R. Marchese provides, relevant account opening documents are reviewed when the relationship is established, and client correspondence is reviewed periodically. In addition, account activity is reviewed at least annually to ensure that trading is in line with your stated objectives. Factors that are considered include but are not limited to the following: investment objectives, targeted allocation, current allocation, suitability, performance, number of trades, monthly distributions, concentrated positions, diversification, and outside holdings.