

SB Advisory, LLC

Item 1 – Cover Page

Form ADV Brochure Part 2B
Brochure Supplement
Date of Supplement: January 1st, 2025

SB Advisory, LLC
Towner Place
3424 Peachtree Road
Atlanta, Georgia 30326
Telephone Number: (404) 704-0406

This Brochure Supplement provides information about **Jeffrey Rodriguez** that supplements SB Advisory, LLC's ("SB Advisory") Brochure. You should have received a copy of that Brochure. Please contact the Firm's Chief Compliance Officer at the number provided above if you have not received our Brochure or if you have any questions about the content of this Supplement.

Additional information about Jeffrey Rodriguez is available on the SEC's Website at www.adviserinfo.sec.gov.

Item 2 – Educational Background and Business Experience

Name of Supervised Person: Jeffrey Rodriguez

Year of Birth: 1979

Formal Education:

In 2002, Mr. Rodriguez obtained his Bachelor degree of Public Accounting from the Pontifical Catholic University of Puerto Rico. In the year 2006 he got his Master in Global Management from University of Phoenix.

Business Experience:

Registered Representative	San Blas Securities	2024 - Present
Registered Investment Adviser representative	SB Advisory	2024 - Present
Registered Representative	B Riley Wealth	2019 - 2024
Registered Investment Adviser representative	B Riley Advisory	2019 – 2024

Designations:

Mr. Jeffrey Rodriguez is a **CERTIFIED FINANCIAL PLANNER®**

All CFP® professionals must pass a CFP-board registered program or hold one of seven advanced degrees, designations, or professional licenses and pass the CFP exam. Prerequisites include a bachelor's degree (or higher) from an accredited college or university and three full years of full-time personal financial planning experience. Thirty hours of continuing education must be completed every two years. Areas of study include insurance and estate planning, employee benefit, and tax planning, as well as investment and retirement planning.

CFP practitioners are also subject to strict adherence to the CFP Board's Financial Planning Practice Standards and Professional Code of Ethics and Responsibility.

Mr. Jeffrey Rodriguez is a **Certified Investment Management Analyst®**

The CIMA certification signifies that an individual has met initial and on-going experience, ethical, education and examination requirements for investment management consulting, including advance investment management theory and application. Prerequisites for the CIMA certification

are three years of financial services experience and an acceptable regulatory history. To obtain the CIMA certification, candidates must pass an online qualification examination, successfully complete a one-week classroom education program provided by a Registered Education Provider at an AACSB accredited university business school, and pass an online Certification Examination. CIMA designees are required to adhere to IWI's Code of Professional Responsibility, Standards of Practice, and Rules and Guidelines for Use of the Marks. CIMA designees must report 40 hours of continuing education credits, including two ethics hours, every two years to maintain the certification. The designation is administered through the Investment and Wealth Institute. The CIMA certification has earned ANSI (American National Standards Institute) accreditation under the professional certification program.

Mr. Jeffrey Rodriguez is an **Accredited Investment Fiduciary®**

The AIF® Designation certifies that the recipient has demonstrated specialized knowledge of fiduciary standards of care and their application to the investment management process. To receive the AIF® Designation, the individual must meet prerequisite criteria based on a combination of education, relevant industry experience, and/or ongoing professional development, complete a training program, successfully pass a comprehensive, closed-book final examination under the supervision of a proctor and agree to abide by the Code of Ethics and Conduct Standards. In order to maintain the AIF® Designation, the individual must annually attest to the Code of Ethics and Conduct Standards and accrue and report a minimum of six hours of continuing education. The Designation is administered by the Center for Fiduciary Studies, the certification division of Fi360 that is responsible for ongoing management of the program. Fi360 is accredited by the ANSI National Accreditation Board for the AIF® Designation, making it one of few independently accredited designations recognized by FINRA.

Item 3 – Disciplinary Information

No disciplinary information to report.

For more detailed information you may search the advisor's public record at, www.finra.org/brokercheck; the IAPD link is www.adviserinfo.sec.gov.

Item 4 – Other Business Activities

Mr. Rodriguez uses the business name 360ONE, LLC. Mr. Rodriguez uses this business name for marketing and/or tax purposes but offers securities and investment advice through the registered broker-dealer or registered investment advisor described below. SB Advisory is not affiliated with 360ONE, LLC.

Item 5 – Additional Compensation

There is no additional compensation to report for this financial advisor.

Item 6 – Supervision

Daniel Padilla services as the Chief Compliance Officer of SB Advisory. He is responsible for supervising the investment adviser representatives providing investment advice to clients. Supervision is performed on an individual client basis and formal compliance reviews are conducted annually. Mr. Padilla can be contacted at (404) 704-0406.