



EFG Private Wealth Management (Americas) Corp.

Brochure Supplement April 2026

Part 2B of Form ADV: Individual Disclosure Brochure

Luis Guilherme de Melo Ferreira

Deputy Chief Executive Officer and Chief Investment Officer for the Americas

*This brochure supplement provides information about **LUIS GUILHERME DE MELO FERREIRA** that supplements the EFG Private Wealth Management (Americas) Corp. (“EFG Private Wealth” or “Adviser”) brochure. You should have received a copy of that brochure. Please contact Compliance at miamicompliance@efgam.com or 305-482-8000 if you did not receive Adviser’s brochure or if you have any questions about the contents of this supplement.*

*Additional information about **LUIS GUILHERME DE MELO FERREIRA** is also available on the SEC’s Investment Adviser Public Disclosure (IAPD) website at www.Adviserinfo.sec.gov.*

EFG Private Wealth Management (Americas) Corp.

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luis.ferreira@efgcapital.com



Item 2: Educational Background and Business Experience

Name: LUIS GUILHERME DE MELO FERREIRA
Born: 1985

Luis Ferreira holds a Bachelor's degree in Economics from Pontifical Catholic University in Minas Gerais, Brazil, and a master's degree from Strayer University.

Luis has over 20 years of experience advising ultra-high-net-worth clients across global markets. He joined the Adviser as Deputy Chief Executive Officer and Chief Investment Officer for the Americas in July 2025 and has been with EFG Capital International Corp. ("EFG Brokerage"), a broker-dealer affiliate of Adviser, since 2017 as a Managing Director, Head of Investment Strategy Group. As CIO for the Americas and Deputy CEO of EFG Private Wealth, he leads investment strategy and advisory across the United States, Switzerland, the Caribbean, and Latin America. Luis oversees asset allocation, manager selection, and portfolio performance across a wide range of client mandates and is also responsible for the development and enhancement of the Adviser's investment platform and cross-border advisory capabilities. His previous experience includes senior positions at EFG Bank & Trust (Bahamas), Delta National Bank and Trust Company in New York, and the former Banco Alfa de Investimento S.A. in Brazil (currently Banco Safra).

Item 3: Disciplinary Information

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of Luis' advisory activities. Luis has no reportable disciplinary history.

Item 4: Other Business Activities

Luis maintains a Series 7 (General Securities Representative) registration as a Registered Representative of EFG Brokerage. Trades are executed for Luis' Adviser client accounts directly or indirectly through EFG Brokerage. Luis does not receive commission, bonuses or other compensation on the sale of securities or other investment products, including with respect to the sale of securities or other investment products by or to customers of EFG Brokerage or as a direct or indirect consequence of the trading activity conducted with respect to Adviser client accounts at EFG Brokerage. Luis is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of his time.

Adviser's policies require personnel who develop advice and recommendations for clients of Adviser, including Luis, to render only disinterested and impartial advice to clients and to comply with other fiduciary obligations.

Item 5: Additional Compensation

Luis does not receive any economic benefit from a non-advisory client for the provision of services. He is compensated by Adviser in the form of salary and is eligible for discretionary bonuses based on a variety of factors, including overall firm and business performance. His compensation is not based on the sale of specific securities or investment products.

Item 6: Supervision

Luis is supervised in his role with Adviser by Eduardo Cruz, Chief Executive Officer. Eduardo may be reached by contacting (305) 482-8000. Additionally, Luis works closely with Adviser's Compliance Department whose contact information is on the cover page of this disclosure document. Adviser's accounts are reviewed on an ongoing basis by the Adviser's Risk and Compliance department, as well as by management during quarterly investment control and risk committee meetings.



EFG Private Wealth Management (Americas) Corp.

Brochure Supplement April 2026

Part 2B of Form ADV: Individual Disclosure Brochure

Hans Abate

Head of Portfolio Management

Investment Adviser Representative

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*Additional information about **Hans Abate** is also available on the SEC’s Investment Adviser Public Disclosure (IAPD) website at www.Adviserinfo.sec.gov.*

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701 Brickell Ave, Suite 1310

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(305) 482-8000

Hans.Abate@efgam.com



Item 2: Educational Background and Business Experience

Name: Hans Abate
Born: 1964

As Head of Portfolio Management for Adviser, Hans is responsible for the strategic development of the portfolio management team, the development and implementation of Adviser's strategies and overall investment selection. Hans also serves as the representative member for the Americas on the EFG Global Investment Committee geared towards the development of the EFG Private Wealth's economic views and global asset allocation strategies. Hans is a registered Investment Adviser Representative with extensive knowledge and experience in advising clients with respect to their investments and actively managing discretionary accounts. He began his career in the industry in 1986 as a credit analyst and then transitioned into trading in domestic and foreign securities. Hans joined Adviser's predecessor, EFG Capital Asset Management LLC ("EFG Capital"), in 2005. Prior to joining EFG Capital, Hans was the Head of Investments for Dresdner Lateinamerika Financial Advisors ("Dresdner") for 11 years. His role at Dresdner covered portfolio and risk management, new product development and client advisory services, supporting institutional and private wealth management offerings. He also served as Dresdner's fixed income strategist and as an advisor for Dresdner's Latin American discretionary managed portfolios. Hans graduated from Roger Williams University with a Bachelor of Science degree in Business Administration, and a minor in Economics. He maintains Financial Industry Regulatory Authority ("FINRA") Series 7, Series 53 and Series 66 registrations.

Item 3: Disciplinary Information

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of Hans' advisory activities. Hans has no reportable disciplinary history.

Item 4: Other Business Activities

Hans maintains a Series 7 (General Securities Representative), Series 66 (Uniform Combined State Law) and Series 53 (Municipal Securities Principal) registrations as a Registered Representative of EFG Capital International Corp. ("EFG Brokerage"), a broker-dealer affiliate of Adviser. Hans, as a municipal securities principal of EFG Brokerage, may be involved with approving or analyzing the trading activity of EFG Brokerage in municipal securities. He is not engaged in any other investment-related activities with EFG Brokerage. He does not receive commission, bonuses or other compensation on the sale of securities or other investment products, including with respect to the sale of securities or other investment products by or to customers of EFG Brokerage or as a direct or indirect consequence of the trading activity conducted with respect to Adviser client accounts at EFG Brokerage. Trades are executed for Hans' Advisory client accounts directly or indirectly through EFG Brokerage. However, Adviser's policies require personnel who develop advice and recommendations for clients of Adviser, including Hans, to render only disinterested and impartial advice to clients and to comply with other fiduciary obligations.

Hans serves as President of Jan Bran, Inc., a beauty cosmetic distribution company operated and run by the employee's spouse. There is passive involvement with the day-to-day operations but anticipates attending various cosmetic conventions. Additionally, Hans serves as President of Kanusa Inc., a family holding company for his parent's residential apartment in Miami, FL. No compensation is received nor is there time spent on the activities during trading hours. Hans is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of his time.

Item 5: Additional Compensation

Hans does not receive any economic benefit from any non-advisory client for the provision of services. He is compensated by Adviser in the form of salary and is eligible for discretionary bonuses based on a variety of factors, including overall firm and business performance. His compensation is not based on the sale of specific securities or investment products.

Item 6: Supervision

Hans is supervised by Eduardo Cruz, Chief Executive Officer. Eduardo may be reached by contacting (305) 482-8000. Additionally, Hans works closely with Adviser's Compliance Department whose contact information is on the cover page of this disclosure document. Adviser's accounts are reviewed on an ongoing basis by the Adviser's Risk and Compliance department, as well as by management during quarterly investment control and risk committee meetings.



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Brochure Supplement April 2026
Part 2B of Form ADV: Individual Disclosure Brochure

Thiago Favery

Financial Advisor

Registered Investment Adviser Representative

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(305) 482-8000
thiago.favery@efgcapital.com



Item 2: Educational Background and Business Experience

Name: *Thiago Favery*
Born: 1983

Thiago holds a degree in Business Administration from EAESP-FGV, with specializations in finance from the University of Chicago and Columbia Business School. He is also a Chartered Financial Analyst (CFA) charterholder. Thiago has 20 years of experience in the international financial markets. Before joining the Adviser in 2025, from 2018 to 2024 he was Managing Director at XP Investments and CEO of XP Advisory US, leading the investment and commercial teams in the U.S. with a focus on serving high-net-worth Brazilian clients. He also has prior experience as a global portfolio manager and investment analyst.

Item 3: Disciplinary Information

Over the past 10 years, there have been no legal or disciplinary events that are material to a client's or prospective client's evaluation of Thiago's advisory activities. Thiago has no reportable disciplinary history.

Item 4: Other Business Activities

Thiago maintains a Series 7 (General Securities Representative), Series 63 (Uniform Securities Agent State Law), Series 4 (Registered Options Principal), and Series 24 (General Securities Principal) registrations as a Registered Representative of EFG Capital International Corp. ("EFG Brokerage"), a broker-dealer affiliate of Adviser. Trades are executed for Thiago's Adviser client accounts directly or indirectly through EFG Brokerage. However, Adviser's policies require personnel who develop advice and recommendations for clients of Adviser, including Thiago, to render only disinterested and impartial advice to clients and to comply with other fiduciary obligations.

Thiago is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of his time.

Item 5: Additional Compensation

Thiago does not receive any economic benefit from a non-advisory client for the provision of services.

Item 6: Supervision

Thiago is supervised by Eduardo Cruz, Chief Executive Officer. Eduardo may be reached at (305) 482-8000. Additionally, as an Investment Adviser Representative of Adviser, Thiago works closely with Adviser's Compliance Department whose contact information is on the cover page of this disclosure document. Adviser's accounts are reviewed on an ongoing basis by the Adviser's Risk and Compliance department, as well as by management during quarterly investment control and risk committee meetings.



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Brochure Supplement April 2026

Part 2B of Form ADV: Individual Disclosure Brochure

Raphael Pinheiro

Financial Advisor

Registered Investment Adviser Representative

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*Additional information about **Raphael Pinheiro** is also available on the SEC’s Investment Adviser Public Disclosure (IAPD) website at www.Adviserinfo.sec.gov.*

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raphael.pinheiro@efgcapital.com



Item 2: Educational Background and Business Experience

Name: *Raphael Pinheiro*
Born: 1988

Raphael Pinheiro is a Client Relationship Officer (“CRO”)/Managing Director at EFG Capital International Corp. (“EFG Brokerage”), a broker-dealer affiliate of Adviser, and a Registered Investment Adviser Representative of the Adviser since 2025. Prior to EFG, Raphael spent more than three years at XP Investments as a Director and has over 10 years of experience in financial markets. Prior to that, he worked on the Investments Desk of JP Morgan’s Private Bank in New York, serving ultra-high-net-worth clients and was an Investment and Risk Analyst at Credit Suisse.

Raphael Pinheiro holds a Bachelor of Business Administration in Finance and International Business and a Minor in Economics from Villanova University in Pennsylvania, United States. He is also a Chartered Financial Analyst.

Item 3: Disciplinary Information

Over the past 10 years, there have been no legal or disciplinary events that are material to a client’s or prospective client’s evaluation of Raphael’s advisory activities. Raphael has no reportable disciplinary history.

Item 4: Other Business Activities

Raphael maintains a Series 7 (General Securities Representative) and a Series 63 (Uniform Securities Agent State Law) as a Registered Representative of EFG Brokerage. Trades are executed for Raphael’s Adviser client accounts directly or indirectly through EFG Brokerage. However, Adviser’s policies require personnel who develop advice and recommendations for clients of Adviser, including Raphael, to render only disinterested and impartial advice to clients and to comply with other fiduciary obligations.

Raphael is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of his time.

Item 5: Additional Compensation

Raphael does not receive any economic benefit from a non-advisory client for the provision of services.

Item 6: Supervision

Raphael is supervised by Eduardo Cruz, Chief Executive Officer. Eduardo may be reached at (305) 482-8000. Additionally, as an Investment Adviser Representative of Adviser, Raphael works closely with Adviser’s Compliance Department whose contact information is on the cover page of this disclosure document. Adviser’s accounts are reviewed on an ongoing basis by the Adviser’s Risk and Compliance department, as well as by management during quarterly investment control and risk committee meetings.



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Brochure Supplement April 2026

Part 2B of Form ADV: Individual Disclosure Brochure

Fernando Olea

Financial Advisor

Registered Investment Adviser Representative

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fernando.olea@efgcapital.com



Item 2: Educational Background and Business Experience

Name: *Fernando Olea*
Born: 1988

Advisor earned a bachelor's degree in international relations in 2010, and a postgraduate degree in Business in 2013, providing him with a solid foundation in both global affairs and business management. Mr Olea has over ten years of experience in the financial services industry, particularly in wealth management and private banking. Fernando started his investment career in 2014 at Goldman Sachs. He then worked for XP Investimentos from 2015 to 2016, subsequently moving to XP International in 2017. In 2025, Fernando joined EFG Capital International Corp. ("EFG Brokerage"), a broker-dealer affiliate of Adviser, as Managing Director / Financial Advisor, and EFG Private Wealth as a registered investment adviser.

Item 3: Disciplinary Information

Over the past 10 years, there have been no legal or disciplinary events that are material to a client's or prospective client's evaluation of Fernando's advisory activities. Fernando has no reportable disciplinary history.

Item 4: Other Business Activities

Fernando maintains a Series 7 (General Securities Representative), Series 66 (Uniform Combined State Law), and Series 24 (General Securities Principal) registrations as a Registered Representative of EFG Brokerage. Trades are executed for Fernando's Adviser client accounts directly or indirectly through EFG Brokerage. However, Adviser's policies require personnel who develop advice and recommendations for clients of Adviser, including Fernando, to render only disinterested and impartial advice to clients and to comply with other fiduciary obligations.

Fernando is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of his time.

Item 5: Additional Compensation

Fernando does not receive any economic benefit from a non-advisory client for the provision of services.

Item 6: Supervision

Fernando is supervised by Eduardo Cruz, Chief Executive Officer. Eduardo may be reached at (305) 482-8000. Additionally, as an Investment Adviser Representative of Adviser, Fernando works closely with Adviser's Compliance Department whose contact information is on the cover page of this disclosure document. Adviser's accounts are reviewed on an ongoing basis by the Adviser's Risk and Compliance department, as well as by management during quarterly investment control and risk committee meetings.



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Brochure Supplement April 2026
Part 2B of Form ADV: Individual Disclosure Brochure

Felipe Sebe Lopes

Financial Advisor

Registered Investment Adviser Representative

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Felipe.Sebe@efgcapital.com



Item 2: Educational Background and Business Experience

Name: *Felipe Sebe Lopes*
Born: 1990

Felipe Sebe Lopes earned a Bachelor of Business Administration from ESPM – Escola Superior de Propaganda e Marketing in Brazil in 2012.

Felipe began his financial services career in 2015 at XP Investimentos CCTVM in Brazil. In 2016, he was transferred to XP Investments US LLC in Miami, where he held senior roles and became a Partner and Private Banker. He remained with XP until 2024. In 2025 Felipe joined the Adviser as a Registered Investment Adviser Representative and EFG Capital International Corp. (“EFG Brokerage”), a broker-dealer affiliate of Adviser, as a Financial Advisor. Felipe advises high-net-worth individuals and families across Latin America and the United States, with experience in portfolio construction, wealth planning, and cross-border investment strategies.

Item 3: Disciplinary Information

Over the past 10 years, there have been no legal or disciplinary events that are material to a client’s or prospective client’s evaluation of Felipe’s advisory activities. Felipe has no reportable disciplinary history.

Item 4: Other Business Activities

Felipe maintains a Series 7 (General Securities Representative) and a Series 66 (Uniform Combined State Law) as a Registered Representative of EFG Brokerage. Trades are executed for Felipe’s Adviser client accounts directly or indirectly through EFG Brokerage. However, Adviser’s policies require personnel who develop advice and recommendations for clients of Adviser, including Felipe, to render only disinterested and impartial advice to clients and to comply with other fiduciary obligations.

Felipe is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of his time.

Item 5: Additional Compensation

Felipe does not receive any economic benefit from a non-advisory client for the provision of services.

Item 6: Supervision

Felipe is supervised by Eduardo Cruz, Chief Executive Officer. Eduardo may be reached at (305) 482-8000. Additionally, as an Investment Adviser Representative of Adviser, Felipe works closely with Adviser’s Compliance Department whose contact information is on the cover page of this disclosure document. Adviser’s accounts are reviewed on an ongoing basis by the Adviser’s Risk and Compliance department, as well as by management during quarterly investment control and risk committee meetings.



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Brochure Supplement April 2026
Part 2B of Form ADV: Individual Disclosure Brochure

Eric B. Smalley

*Client Relationship Officer
Registered Investment Adviser Representative*

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*Additional information about **Eric Smalley** is also available on the SEC’s Investment Adviser Public Disclosure (IAPD) website at www.Adviserinfo.sec.gov.*

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Eric.Smalley@EFGcapital.com



Item 2: Educational Background and Business Experience

Name: Eric B. Smalley
Born: 1979

Eric earned his Bachelor of Science in Business Administration from Thomas Edison State University, Trenton New Jersey, in 2007. Eric started his investment career at Merrill Lynch as a Client Service Associate from 2003 until 2007. He then joined Northern Trust Securities as a Financial Assistant in May 2007. Eric joined EFG Capital International Corp. in September 2007 as a Client Service Officer, subsequently moving to the role of Junior Client Relationship Officer before advancing to his current position of Client Relationship Officer. Eric was also a registered investment adviser with EFG Capital Advisors LLC between 2010 and 2014 and EFG Capital Advisors Inc. from 2016 to 2019 before associating with Adviser in November 2019.

Item 3: Disciplinary Information

There are no legal or disciplinary events that are material to a client's or prospective evaluation of Eric's advisory activities. Eric has no reportable disciplinary history to disclose and has never been involved in any regulatory, civil, or criminal action.

Item 4: Other Business Activities

Eric maintains a Series 7 (General Securities Representative) and Series 66 (Uniform Combined State Law) registrations as a Registered Representative of EFG Capital International Corp. ("EFG Brokerage"), a broker-dealer affiliate of Adviser. Trades are executed for Eric's Adviser client accounts directly or indirectly through EFG Brokerage. However, Adviser's policies require personnel who develop advice and recommendations for clients of Adviser, including Eric, to render only disinterested and impartial advice to clients and to comply with other fiduciary obligations. Eric is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of his time.

Item 5: Additional Compensation

Eric does not receive any economic benefit from a non-advisory client for the provision of services.

Item 6: Supervision

Eric is supervised in his role with Adviser by Eduardo Cruz, Chief Executive Officer. Eduardo may be reached by contacting (305) 482-8000. Additionally, as an Investment Adviser Representative of Adviser, Eric works closely with Adviser's Compliance Department whose contact information is on the cover page of this disclosure document. Adviser's accounts are reviewed on an ongoing basis by the Adviser's Risk and Compliance departments, as well as by management during quarterly investment control and risk committee meetings.



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Brochure Supplement April 2026
Part 2B of Form ADV: Individual Disclosure Brochure

Fernando Monteiro de Barros

*Client Relationship Officer
Registered Investment Adviser Representative*

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*Additional information about **Fernando Monteiro de Barros** is also available on the SEC's Investment Adviser Public Disclosure (IAPD) website at www.Adviserinfo.sec.gov.*

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Fernando.Monteiro@EFGcapital.com



Item 2: Educational Background and Business Experience

Name: Fernando Monteiro de Barros
Born: 1971

Fernando graduated from the College of Business Administration, Mackenzie University in Sao Paulo, Brazil in 1993 and thereafter obtained a Master of Business Administration and Marketing in 1995 from Escola Superior de Propaganda e Marketing (ESPM) in Sao Paulo, Brazil. Fernando also graduated with a Master in Capital Markets from the Brazilian Capital Market Institute (IBMEC – Instituto Brasileiro de Mercado de Capitais) – Sao Paulo, Brazil in 2001. Further afield, Fernando specialized in Corporate Finance at the University of California, Berkeley – USA where he earned his degree in 1997. Fernando worked at several institutions prior to joining EFG Capital International Corp. (“EFG Brokerage”), a broker-dealer affiliate of Adviser, as a Client Relationship Officer in December 2008. These included Banco ITAU S.A., Bank of Boston Brazil, BankBoston International and Banco Itaú Europa International S.A. Fernando was also a registered investment adviser with EFG Capital Advisors LLC between 2009 and 2014 and EFG Capital Advisors Inc. between Aug 2016 and February 2019 before associating with Adviser in September 2019.

Item 3: Disciplinary Information

Over the past 10 years, there have been no legal or disciplinary events That are material to a client’s or prospective client’s evaluation of Fernando’s advisory activities.

Item 4: Other Business Activities

Fernando maintains a Series 7 (General Securities Representative) and Series 66 (Uniform Combined State Law) registrations as a Registered Representative of EFG Brokerage. Trades are executed for Fernando Adviser client accounts directly or indirectly through EFG Brokerage. However, Adviser’s policies require personnel who develop advice and recommendations for clients of Adviser, including Fernando, to render only disinterested and impartial advice to clients and to comply with other fiduciary obligations. Fernando is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of his time.

Item 5: Additional Compensation

Fernando does not receive any economic benefit from a non-advisory client for the provision of services.

Item 6: Supervision

Fernando is supervised in his role with Adviser by Eduardo Cruz, Chief Executive Officer. Eduardo may be reached by contacting (305) 482-8000. Additionally, as an Investment Adviser Representative of Adviser, Fernando works closely with Adviser’s Compliance Department whose contact information is on the cover page of this disclosure document. Adviser’s accounts are reviewed on an ongoing basis by the Adviser’s Risk and Compliance departments, as well as by management during quarterly investment control and risk committee meetings.



EFG Private Wealth Management (Americas) Corp.
Brochure Supplement April 2026
Part 2B of Form ADV: Individual Disclosure Brochure

Andres Padilla

*Client Relationship Officer
Registered Investment Adviser Representative*

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Andres.Padilla@EFGcapital.com



Item 2: Educational Background and Business Experience

Name: Andres Padilla Izurieta
Born: 1973

Andres is a 1994 graduate of the College of Staten Island (City University of New York) holding a Bachelor of Science Degree in Economics. Andres advanced his studies and graduated from the University of Miami in 1997 with a Master of Business Administration specializing in Finance. While finishing his graduate studies he worked as a credit analyst at Merrill Lynch International Bank (MLIB) in Miami up until 1998. He then worked for BBVA Wealth Management (Miami) with the Andean Team as a private banker up until 2000. He joined Lloyds TSB (Miami) in the year 2000 as a Private Banker and held that position up until 2008. From 2008 until present he has been a Client Relationship Officer at EFG Capital International Corp. ("EFG Brokerage"), a broker-dealer affiliate of Adviser. Andres was also a registered investment adviser with EFG Capital Advisors LLC between 2011 and 2014 and EFG Capital Advisors Inc. from 2016 to 2019 before associating with Adviser in October 2019.

Item 3: Disciplinary Information

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of Andres' advisory activities. Andres has no reportable disciplinary history.

Item 4: Other Business Activities

Andres maintains a Series 7 (General Securities Representative) and Series 66 (Uniform Combined State Law) registrations as a Registered Representative of EFG Brokerage. Trades are executed for Andres' Adviser client accounts directly or indirectly through EFG Brokerage. However, Adviser's policies require personnel who develop advice and recommendations for clients of Adviser, including Andres, to render only disinterested and impartial advice to clients and to comply with other fiduciary obligations. Andres is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of his time.

Item 5: Additional Compensation

Andres does not receive any economic benefit from a non-advisory client for the provision of services.

Item 6: Supervision

Andres is supervised in his role with Adviser by Eduardo Cruz, Chief Executive Officer. Eduardo may be reached by contacting (305) 482-8000. Additionally, as an Investment Adviser Representative of Adviser, Andres works closely with Adviser's Compliance Department whose contact information is on the cover page of this disclosure document. Adviser's accounts are reviewed on an ongoing basis by the Adviser's Risk and Compliance departments, as well as by management during quarterly investment control and risk committee meetings.



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Brochure Supplement April 2026

Part 2B of Form ADV: Individual Disclosure Brochure

Janet Rodriguez

Senior Portfolio Manager

Investment Adviser Representative

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Janet.Rodriguez@efgam.com



Item 2: Educational Background and Business Experience

Name: Janet Rodriguez
Born: 1985

As a Senior Portfolio Manager for the Adviser, Janet is responsible for supporting the Head of Portfolio Management with respect to the implementation of investment strategies and overall investment selection. In this role Janet is also responsible for the rebalancing of client portfolios. She participates in the weekly market meetings for the Financial Advisors at EFG Capital International Corp. ("EFG Brokerage"), a broker-dealer affiliated with the Adviser, and provides updates on discretionary solution product and services. Janet also leads the contribution and attribution reports, monitoring alpha from active fund managers, in the portfolio manager team meetings. Janet began her career at Bulltick Capital Markets in 2009 as an Equity and Derivatives Trader, focusing on U.S. and international equities, U.S. options, pair trades and trade reporting. Janet joined EFG Brokerage in 2012 as Compliance Associate, addressing suitability analysis and implementation, and became a Junior Portfolio Manager for Adviser in 2013. Janet graduated from the University of Miami in 2008 with a degree in Business Administration, concentrating on Finance and Operations Research. She maintains Financial Industry Regulatory Authority ("FINRA") Series 7, 4 and 66 registrations and holds the Chartered Financial Analyst ("CFA") designation.

Item 3: Disciplinary Information

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of Janet's advisory activities. Janet has no reportable disciplinary history.

Item 4: Other Business Activities

Janet maintains a Series 7 (General Securities Representative), Series 4 (Registered Options Principal) and Series 66 (Uniform Combined State Law) as a Registered Representative of EFG Brokerage. Janet is not engaged in any other investment-related activities with EFG Brokerage. She does not receive commission, bonuses or other compensation on the sale of securities or other investment products, including with respect to the sale of securities or other investment products by or to customers of EFG Brokerage or as a direct or indirect consequence of the trading activity conducted with respect to Adviser client accounts at EFG Brokerage. Trades are executed for Janet's Adviser client accounts directly or indirectly through EFG Brokerage. However, Adviser's policies require personnel who develop advice and recommendations for clients of Adviser, including Janet, to render only disinterested and impartial advice to clients and to comply with other fiduciary obligations.

Janet is a member of the Planning Committee and Peer Engagement Committee for 100 Women in Finance. Her responsibilities are assisting in the organization of meetings and promoting the local chapter / organization to local women. Responsibility also extends to participating in hosting or sponsoring an event such as the organization's philanthropic gala. No compensation is received nor is there time spent on the activity during trading hours. Janet also provides her own dog-sitting services on a weekend, holiday or on a seasonal basis and is compensated based on the level of service. Janet is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of her time.

Item 5: Additional Compensation

Janet does not receive any economic benefit from any non-advisory client for the provision of services. She is compensated by Adviser in the form of salary and is eligible for discretionary bonuses based on a variety of factors, including overall firm and business performance. Her compensation is not based on the sale of specific securities or investment products.

Item 6: Supervision

Janet is supervised by Hans Abate, Head of Portfolio Management. Hans may be reached by contacting (305) 482-8000. Additionally, Janet works closely with Adviser's Compliance Department whose contact information is on the cover page of this disclosure document. Adviser's accounts are reviewed on an ongoing basis by the Adviser's Risk and Compliance department, as well as by management during quarterly investment control and risk committee meetings.



EFG Private Wealth Management (Americas) Corp.
Brochure Supplement April 2026
Part 2B of Form ADV: Individual Disclosure Brochure

Luiz Augusto Alencar Barros “Luiz Barros”

Senior Portfolio Manager

Investment Adviser Representative

*This brochure supplement provides information about **Luiz Barros** that supplements the EFG Private Wealth Management (Americas) Corp. (“EFG Private Wealth” or “Adviser”) brochure. You should have received a copy of that brochure. Please contact Compliance at miamicompliance@efgam.com or 305-482-8000 if you did not receive Adviser’s brochure or if you have any questions about the contents of this supplement.*

*Additional information about **Luiz Barros** is also available on the SEC’s Investment Adviser Public Disclosure (IAPD) website at www.Adviserinfo.sec.gov.*

EFG Private Wealth Management (Americas) Corp.
701 Brickell Ave, Suite 1310
Miami, FL. 33131
(305) 482-8000
Luiz.Barros@efgam.com



Item 2: Educational Background and Business Experience

Name: Luiz Augusto Alencar Barros (“Luiz Barros”)
Born: 1967

Luiz manages the implementation of the discretionary investment strategies and overall investment selection. In this role Luiz is also responsible for the rebalancing of client portfolios. Luiz has over 30 years of experience as a Senior Executive, Manager, Treasurer, and Trader mainly in investment banks, and private banks. Luiz has deep expertise in asset and liability management, fixed income, foreign exchange, risk management, investment management, investment solutions, structured products, client sales, project management and leadership skills. Throughout his career, Luiz worked in global organizations such as UBS, ING and Standard Bank. These organizations have distinguished reputations with international leadership and in their countries of origin are recognized in their niche markets.

Prior to joining the Adviser in August 2023, Luiz worked at BTG Pactual US Capital LLC in Miami, FL as an Associate Partner, Transaction Products, from Dec 2022 to June 2023. Prior to his stint with BTG Pactual, Luiz was employed with Kawa Capital Management in Aventura, FL as Managing Director from October 2021 to November 2022. Luiz joined affiliate banking entity - EFG Bank AG, Lugano, Switzerland, from 2016 to 2021 as Senior Vice President, Head of Asset & Liability Management and Investments.

Luiz has an MBA from Northwestern University, Kellogg School of Management jointly with WHU Otto Beisheim School of Management, Germany. He is fluent in English and Portuguese and maintains Financial Industry Regulatory Authority (“FINRA”) Series 7, Series 63 and Series 65 registrations.

Item 3: Disciplinary Information

There are no legal or disciplinary events that are material to a client’s or prospective client’s evaluation of Luiz’ advisory activities. Luiz has no reportable disciplinary history.

Item 4: Other Business Activities

Luiz maintains a Series 7 (General Securities Representative), Series 63 (Uniform Securities Agent State Law) and Series 65 (Uniform Investment Adviser Law) registrations as a Registered Representative of EFG Capital International Corp. (“EFG Brokerage”), a broker-dealer affiliate of Adviser. Luiz is not engaged in any other investment-related activities with EFG Brokerage. He does not receive commission, bonuses or other compensation on the sale of securities or other investment products, including with respect to the sale of securities or other investment products by or to customers of EFG Brokerage or as a direct or indirect consequence of the trading activity conducted with respect to Adviser client accounts at EFG Brokerage. Trades are executed for Luiz’s Adviser client accounts directly or indirectly through EFG Brokerage. However, Adviser’s policies require personnel who develop advice and recommendations for clients of Adviser, including Luiz, to render only disinterested and impartial advice to clients and to comply with other fiduciary obligations. Luiz is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of his time.

Item 5: Additional Compensation

Luiz does not receive any economic benefit from a non-advisory client for the provision of services. He is compensated by Adviser in the form of salary and is eligible for discretionary bonuses based on a variety of factors, including overall firm and business performance. His compensation is not based on the sale of specific securities or investment products.

Item 6: Supervision

Luiz is supervised by Hans Abate, Head of Portfolio Management. Hans may be reached at (305) 482-8000. Additionally, Luiz works closely with Adviser’s Compliance Department whose contact information is on the cover page of this disclosure document. Adviser’s accounts are reviewed on an ongoing basis by the Adviser’s Risk and Compliance department, as well as by management during quarterly investment control and risk committee meetings.



EFG Private Wealth Management (Americas) Corp.

Brochure Supplement April 2026

Part 2B of Form ADV: Individual Disclosure Brochure

Humberto Romeo Garcia Jr.

Senior Portfolio Manager

Investment Adviser Representative

*This brochure supplement provides information about **Humberto Romeo Garcia Jr.** that supplements the EFG Private Wealth Management (Americas) Corp. (“EFG Private Wealth” or “Adviser”) brochure. You should have received a copy of that brochure. Please contact Compliance at miamicompliance@efgam.com or 305-482-8000 if you did not receive Adviser’s brochure or if you have any questions about the contents of this supplement.*

*Additional information about **Humberto Romeo Garcia Jr** is also available on the SEC’s Investment Adviser Public Disclosure (IAPD) website at www.Adviserinfo.sec.gov.*

EFG Private Wealth Management (Americas) Corp.

701 Brickell Ave, Suite 1310

Miami, FL 33131

(305) 482-8000

Humberto.Garcia@efgcapital.com



Item 2: Educational Background and Business Experience

Name: *Humberto Romeo Garcia Jr*
Born: 1965

Humberto joined EFG Private Wealth in 2025 as Senior Portfolio Manager responsible for leading the management and development of fixed income portfolios, including security selection (corporate and sovereign, U.S. High Yield, U.S. Investment Grade, and LatAm), mutual funds, and alternative investments. In this role Humberto is also responsible for providing credit analysis of fixed income issuers using both primary and secondary sources. Prior to this role with EFG Private Wealth, Humberto was a Fixed Income Specialist with EFG Capital International Corp. ("EFG Brokerage"), a broker-dealer affiliate of Adviser, and previously worked in an investment capacity with Mizuho Securities, Bank Leumi USA, and Macquarie Capital (USA). *Humberto* has a Bachelor from Stanford University and a Master of Public Policy from Harvard University.

Item 3: Disciplinary Information

There have been no legal or disciplinary events that are material to a client's or prospective client's evaluation of Humberto's advisory activities. Humberto has no reportable disciplinary history.

Item 4: Other Business Activities

Humberto maintains a Series 7 (General Securities Representative), Series 24 (General Securities Principal), and a Series 66 (Uniform Combined State Law) as a Registered Representative of EFG Brokerage. Trades are executed for Humberto's Adviser client accounts directly or indirectly through EFG Brokerage. However, Adviser's policies require personnel who develop advice and recommendations for clients of Adviser, including Humberto, to render only disinterested and impartial advice to clients and to comply with other fiduciary obligations.

Humberto is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of his time.

Item 5: Additional Compensation

Humberto does not receive any economic benefit from a non-advisory client for the provision of services. He is compensated by Adviser in the form of salary and is eligible for discretionary bonuses based on a variety of factors, including overall firm and business performance. His compensation is not based on the sale of specific securities or investment products.

Item 6: Supervision

Humberto reports to Hans Abate, Head of Portfolio Management. Hans Abate can be reached at (305) 482-8000. Humberto also works closely with Adviser's Compliance Department whose contact information is on the cover page of this disclosure document. Adviser's accounts are reviewed on an ongoing basis by the Adviser's Risk and Compliance department, as well as by management during quarterly investment control and risk committee meetings.