



**Brochure Supplement**  
(Part 2B of Form ADV)

**Jeffery D. Brookshire, CFP®**  
**CRD # 2964215**

**Pacific Wealth Strategies Group, Inc.**

4141 State Street, Suite B11  
Santa Barbara, CA 93110

Ph: 805-966-7775  
[www.pwsg.net](http://www.pwsg.net)

**March 03, 2026**

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This brochure supplement provides information about Jeffrey D. Brookshire that supplements *Pacific Wealth Strategies Group, Inc.*'s ("PWSG" or the "Firm") Brochure, of which you should have received a copy. Please contact our Chief Compliance Officer at 805-966-7775 if you did not receive the Firm's Brochure or if you have any questions about the contents of this supplement. Thank you.

Additional information about Jeffrey D. Brookshire (CRD #2964215) is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 1 Cover Page

Please see previous page.

## Item 2 Educational Background and Business Experience

**Year of Birth:** 1969

### **Educational Background:**

- Bachelor of Arts in Economics, University of California at Santa Barbara: 1993

### **Business Background:**

- Pacific Wealth Strategies Group, Inc., *Vice President, Corporate Secretary & Treasurer*, 04/2020 to Present
- Pacific Wealth Strategies Group, Inc., *President, Chief Compliance Officer*, 11/2010 to 04/2020
- Pacific Wealth Strategies Group, Inc., *Investment Adviser Representative*, 08/2007 to Present
- Cetera Investment Advisers, LLC DBA First Allied Advisory Services, *Investment Adviser Representative*, 11/2020 to 04/2022
- First Allied Advisory Services, Inc., *Investment Adviser Representative*, 06/2003 to 11/2020
- First Allied Securities, Inc., *Registered Representative*, 04/2002 to 04/2022
- Pacific Wealth Strategies Group, Inc., *Vice President, Corporate Secretary & Treasurer*, 08/2007 to 11/2010

### **Professional Designations**

- Certified Financial Planner, United States by Certified Financial Planner Board of Standards, Inc.: 2002

The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP (with flame design) marks (collectively, the “CFP® marks”) are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”).

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients. Currently, more than 71,000 individuals have obtained CFP® certification in the United States.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- Education – Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board’s studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a Bachelor’s Degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP Board’s financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;
- Examination – Pass the comprehensive CFP® Certification Examination. The examination, administered in 10 hours over a two-day period, 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;

- Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
- Ethics – Agree to be bound by CFP Board's Standards of Professional Conduct, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- Continuing Education – Complete 30 hours of continuing education hours every two years, including two hours on the Code of Ethics and other parts of the Standards of Professional Conduct, to maintain competence and keep up with developments in the financial planning field; and
- Ethics – Renew an agreement to be bound by the Standards of Professional Conduct. The Standards prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board's enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

CFP Acknowledgment: Jeffery Dane Brookshire acknowledges his responsibility as a CFP® Certificant to adhere to the standards that have been established in the CFP Board's Standards of Professional Conduct. If you become aware that Mr. Brookshire's conduct may violate the Standards of Professional Conduct, you may file a complaint with the CFP Board at [www.CFP.net/complaint](http://www.CFP.net/complaint).

### **Item 3      Disciplinary Information**

PWSG is required to disclose all material facts regarding any legal or disciplinary event that would be material to your evaluation of each investment person providing advice to you. Mr. Brookshire has no information required to be disclosed under this Item.

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

Jeffrey Brookshire is not engaged in any investment-related business or occupation (other than this advisory firm).

### **Conflicts of Interest**

PWSG addresses these conflicts of interest by requiring its supervised persons to act in the best interest of the client at all times, including when acting as an insurance agent. PWSG periodically reviews recommendations made to PWSG clients by its supervised persons to assess whether they are based on an objective evaluation of each client's risk profile and investment objectives rather than on the receipt of any commissions or other benefits. PWSG discloses, mainly via its Form ADV Part 1, Part 2A, Part 2Bs and Form CRS, how the firm and its supervised persons are compensated, along with the conflicts of interest involving any advice or service provided. At no time will there be tying between business practices and/or services; a condition where a client or prospective client would be required to accept one product or service conditioned upon the selection of a second, distinctive tied product or service.

No PWSG client is ever under any obligation to purchase, sell or use any advisory, insurance, securities, or brokerage products or services with any supervised person of PWSG. Advisory services and insurance and/or securities products or brokerage services recommended by PWSG supervised persons could also

be available from other providers on more favorable terms, and clients can purchase advisory services, insurance and securities products, and/or brokerage services recommended through other, un-affiliated investment advisers, insurance agencies and/or broker-dealers.

Clients are encouraged to ask PWSG representatives any questions you have regarding investment advisory services, insurance, securities, and/or brokerage products or services recommended by PWSG supervised persons and these conflicts of interest. PWSG always acts in the best interest of its clients and clients always have the right to decide whether to utilize the services of any PWSG IAR in any capacity.

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

Outside of his ordinary compensation earned from his position with PWSG, Mr. Brookshire also owns 50% of the PWSG corporate entity and shares in the profits and losses of the firm.

#### **Item 6 Supervision**

Ms. Erin J. Neil, President and Chief Compliance Officer of PWSG, oversees and monitors the activities of Mr. Brookshire on a regular basis. Please contact Ms. Neil at 805-966-7775 if you have any questions about this brochure supplement.