

*Cover Page*



Balanced Money, Balanced Life

**CURTIS "DEAN" CONE, SR.**

**556 Third Street  
Ayden, NC 28513**

**Phone: (252) 746-6785**

March 31, 2026

**FORM ADV PART 2  
BROCHURE SUPPLEMENT**

**This brochure supplement provides information about Curtis "Dean" Cone, Sr. that supplements the Cone Advisory Group, Inc. brochure. You should have received a copy of that brochure.**

**Please contact Curtis "Dean" Cone, Sr. if you did not receive a Cone Advisory Group, Inc.'s brochure or if you have questions about this supplement. Mr. Cone's CRD number is 1684250.**

**Additional information about Curtis "Dean" Cone, Sr. is also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

Form ADV, Part 2B, Item 2

***Educational Background and Business Experience***

Curtis “Dean” Cone, Sr.  
President and CCO  
Year of Birth: 1963

**Business Background:**

Cone Advisory Group, Inc., President and CCO, July 2018 – Present

Symmetry Partners, Investment Advisor Representative, November 2013 – April 2023

The Journeys Group, Partner, November 2009 – August 2021

AlphaStar Capital Management, LLC, Investment Advisor Representative, June 2017 –  
December 2018

Lincoln Financial Securities Corporation, Registered Representative, July 2008 – January 2012

Lincoln Financial, Agent, April 2006 – January 2012

**Educational Background:**

Barton College (formerly Atlantic Christian College), BS Business Administration, 1985

Form ADV, Part 2B, Item 3

***Disciplinary Information***

Mr. Cone does not have any reportable disciplinary disclosures.

Form ADV, Part 2B, Item 4

***Other Business Activities***

Curtis “Dean” Cone, Sr. has a financial industry affiliated business as an independent insurance agent. Not more than 50% of his time is spent on these activities. From time to time, he offers clients advice or products from those activities. He may receive separate yet typical compensation in the form of commissions for the sale of insurance products.

These practices represent a conflict of interest because it gives Mr. Cone an incentive to recommend products based on the commission amount received. This conflict is mitigated by the

fact that Mr. Cone has a fiduciary responsibility to place the best interest of the client first and the clients are not required to purchase any products. Clients have the option to purchase these products through another insurance agent of their choosing.

Curtis “Dean” Cone, Sr. is the sole owner of C2 Farms, LLC, a holding entity for a farm. Additionally, Curtis “Dean” Cone, Sr. is the owner of Pine Cone Holdings LLC. Pine Cone Holdings LLC is a holding entity for the office of Cone Advisory Group, Inc. We do not recommend the services of Pine Cone Holdings LLC. Mr. Cone's duties as the managing member of Pine Cone Holdings LLC do not create a conflict of interest to his provision of advisory services through Cone Advisory Group, Inc.

Form ADV, Part 2B, Item 5

***Additional Compensation***

Curtis “Dean” Cone, Sr. does not receive any economic benefit from anyone, who is not a client, for providing advisory services.

Form ADV, Part 2B, Item 6

***Supervision***

Cone Advisory Group, Inc. has written supervisory procedures in place that are reasonably designed to detect and prevent violations of the securities laws, rules, and regulations of the North Carolina Investment Advisers Act. Mr. Cone is Cone Advisory Group, Inc.’s Chief Compliance Officer and the sole Investment Advisory Representative (“IAR”) of the firm, therefore he is responsible for all of the activities that occur on behalf of Cone Advisory Group, Inc. and its clients. Mr. Cone can be reached at (252) 746-6785.

Form ADV, Part 2B, Item 7

***Requirements for State-Registered Advisers***

Curtis “Dean” Cone, Sr. does not have any reportable disciplinary events required to be disclosed in this section.

*Cover Page*



Balanced Money, Balanced Life

**CURTIS CONE, JR.**

**556 Third Street  
Ayden, NC 28513**

**Phone: (252) 746-6785**

March 31, 2026

**FORM ADV PART 2  
BROCHURE SUPPLEMENT**

**This brochure supplement provides information about Curtis Cone, Jr. that supplements the Cone Advisory Group, Inc. brochure. You should have received a copy of that brochure. Please contact Curtis Cone, Jr. if you did not receive a Cone Advisory Group, Inc.'s brochure or if you have questions about this supplement. Mr. Cone's CRD number is 7905256.**

**Additional information about Curtis Cone, Jr. is also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

Form ADV, Part 2B, Item 2

***Educational Background and Business Experience***

Curtis Cone, Jr.  
Investment Advisor Representative  
Year of Birth: 1995

**Business Background:**

Cone Advisory Group, Inc., Investment Advisor Representative, March 2025 - Present

Cone Advisory Group, Inc., Insurance and Annuity Specialist, July 2018 - Present

**Educational Background:**

East Carolina University, Bachelor of Science in Political Science, Graduated: 2018

Form ADV, Part 2B, Item 3

***Disciplinary Information***

Mr. Cone does not have any reportable disciplinary disclosures.

Form ADV, Part 2B, Item 4

***Other Business Activities***

Curtis Cone, Jr. has a financial industry affiliated business as an independent insurance agent. Not more than 50% of his time is spent on these activities. From time to time, he offers clients advice or products from those activities. He may receive separate yet typical compensation in the form of commissions for the sale of insurance products.

These practices represent a conflict of interest because it gives Mr. Cone an incentive to recommend products based on the commission amount received. This conflict is mitigated by the fact that Mr. Cone has a fiduciary responsibility to place the best interest of the client first and the clients are not required to purchase any products. Clients have the option to purchase these products through another insurance agent of their choosing.

Form ADV, Part 2B, Item 5

***Additional Compensation***

Curtis Cone, Jr. does not receive any economic benefit from anyone, who is not a client, for providing advisory services.

Form ADV, Part 2B, Item 6

***Supervision***

Cone Advisory Group, Inc. has written supervisory procedures in place that are reasonably designed to detect and prevent violations of the securities laws, rules, and regulations of the North Carolina Investment Advisers Act. Mr. Cone is supervised by Cone Advisory Group, Inc.'s Chief Compliance Officer C. Dean Cone, Sr., who is responsible for all of the activities that occur on behalf of Cone Advisory Group, Inc. and its clients. Mr. C. Dean Cone, Sr. can be reached at (252) 746-6785.

Form ADV, Part 2B, Item 7

***Requirements for State-Registered Advisers***

Curtis Cone, Jr. does not have any reportable disciplinary events required to be disclosed in this section.