

This brochure supplement provides information about Investment Adviser Representative, Donna C. Gestl (CRD No. [2636738](#)), that supplements the firm brochure of The Prosperity Consulting Group, LLC d/b/a Prosperity - An EisnerAmper Company (IARD No. [133777](#)) ("Prosperity" or the "Firm"). You should have received a copy of that Brochure. Please contact Donna C. Gestl (contact information below), if you did not receive the Prosperity Brochure or if you have any questions about the contents of this supplement.

Additional information about Investment Adviser Representative, Donna C. Gestl, CRD No. [2636738](#) can be found on the Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov). That website can be searched by using the investment adviser representative's CRD number (shown above).

**BROCHURE SUPPLEMENT**  
*for*  
**DONNA C. GESTL, CFP<sup>®</sup>, AIF<sup>®</sup>**



**PROSPERITY**

An EisnerAmper Company

**Prosperity - An EisnerAmper Company**

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**For Firm Information Contact:**

Donna C. Gestl

Investment Advisor Representative &

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**May 18, 2026**

**EDUCATIONAL BACKGROUND & BUSINESS EXPERIENCE (Item 2)**

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Prosperity requirements for Investment Adviser Representative Employment

Prosperity requires that employees who provide discretionary security selection on behalf of the Firm have at least, a 4-year college degree, 2 years relevant work experience in the securities industry and have taken and passed the appropriate state advisory exam. Investment Adviser Representatives must have work experience that demonstrates their aptitude for financial planning and investment management. Investment Adviser Representatives should have further coursework demonstrating knowledge of financial planning and tax planning. Examples of acceptable coursework include: an MBA, a CFP®, a CFA®, a ChFC, JD, or CPA. If an Investment Adviser Representative does not meet the above requirements, he or she will be required to work jointly with a senior advisor until such requirements are met.

Investment Adviser Representative's Information

**Donna C. Gestl, CFP®, AIF®**

**Year of Birth: 1966**

**Educational Background**

Masters of Science, Applied Economics, Johns Hopkins University, May 2022  
Professional CFP Educational Program, College for Financial Planning, Denver, CO, 1996  
Bachelor of Science, Biology, Towson University, Towson, MD, 1991

**Professional Designation(s)**

**Certified Financial Planner™, CFP®**

I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and I may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at [www.CFP.net](http://www.CFP.net).

CFP® professionals have met CFP Board's standards for education, examination, experience, and ethics. To become a CFP® professional, an individual must fulfill the following requirements:

**Education** – Earn a bachelor's degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials. CFP Board implemented the bachelor's degree or higher requirement in 2007 and the financial planning development capstone course requirement in March 2012. Therefore, a CFP® professional who first became certified before those dates may not have earned a bachelor's or higher degree or completed a financial planning development capstone course;

**Examination** – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual's ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations;

**Experience** – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements; and

**Ethics** – Satisfy the Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement and agree to be bound by CFP Board’s Code of Ethics and Standards of Conduct (“Code and Standards”), which sets forth the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements to remain certified and maintain the right to continue to use the CFP Board Certification Marks:

**Ethics** – Commit to complying with CFP Board’s Code and Standards. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional’s services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.

**Continuing Education** – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

### **Accredited Investment Fiduciary® (AIF®)**

The AIF Designation certifies that the recipient has 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, industry experience, 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. In order to maintain the AIF Designation, the individual must annually renew their affirmation of the Code of Ethics and complete six hours of continuing education. The Designation is administered by the Center for Fiduciary Studies, the standards-setting body of fi360.

### **Business Experience**

<i>Chief Compliance Officer &amp; Investment Adviser Representative</i> Prosperity - An EisnerAmper Company, Owings Mills, MD	<i>11/2004 to Present</i>
<i>Registered Admin</i> DAI Securities, LLC, Atlanta, GA	<i>05/2026 to Present</i>
<i>Chief Operating Officer</i> EAG Wealth Management Strategies, LLC	<i>3/2023 to 01/2024</i>
<i>Registered Representative</i> Triad Advisors, Inc., Norcross, GA	<i>12/2011 to 12/2019</i>
<i>Registered Representative/Investment Advisor Representative</i> 1st Global Capital Corp./1st Global Advisors, Inc., Dallas TX	<i>01/2005 to 12/2011</i>
<i>Owner/Founder</i> New Vision Financial Services, Baltimore, MD	<i>12/2003 to 12/2004</i>
<i>Senior Financial Planner</i> Kissinger Financial Services, Inc., Hunt Valley, MD	<i>03/1998 to 11/2003</i>

## **DISCIPLINARY INFORMATION (Item 3)**

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### Criminal or Civil Actions

None.

### Administrative Actions or Proceedings

None.

### Self-Regulatory Organization (SRO) Proceedings

None.

Professional Standards Violations  
None.

#### **OTHER BUSINESS ACTIVITIES (Item 4)**

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##### Investment Related

Donna C. Gestl is also a licensed insurance agent who transacts insurance product sales through various insurance vendors. Ms. Gestl will earn separate, yet customary compensation for insurance product sales. Ms. Gestl may spend up to two hour per week, on average, selling insurance products.

In her dual roles as investment advisor representative and insurance agent (as referenced in Items 5 and 10 of our Brochure), Ms. Gestl is faced with conflicts of interest whereby the receipt of commissions for selling insurance products gives her an incentive to recommend insurance products based on compensation received, rather than the client's needs. We address this conflict of interest by, among other things, requiring all representatives who are licensed to offer insurance products to our clients to assure that the recommendation to purchase insurance is in the client's best interest. These products may be available through other channels and as a client you are not obligated to purchase insurance products recommended by our representatives. *(Please see Item 10, Financial Industry Affiliations of our Brochure for additional details)*

##### Non-Investment Related

None.

#### **ADDITIONAL COMPENSATION (Item 5)**

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Ms. Gestl earns additional compensation as a result of her dual financial industry activities and affiliations. *(Please see Item 10, Financial Industry Affiliations of our Brochure for additional details)*

#### **SUPERVISION (Item 6)**

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Ms. Gestl is an Investment Adviser Representative and the Chief Compliance Officer for our Firm. As Chief Compliance Officer, Ms. Gestl is responsible for overseeing the compliance aspects of activities of our investment adviser representatives. She also supervises the Firm's other investment adviser representatives. The Firm administers supervision through application of its written policies and procedures.