

*This brochure supplement provides information about Margaret Laughton Bilby that supplements the Gen2 Advisors, LLC brochure. You should have received a copy of that brochure. Please contact Margaret Laughton Bilby if you did not receive Gen2 Advisors, LLC's brochure or if you have any questions about the contents of this supplement.*

*Additional information about Margaret Laughton Bilby is also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).*

## **Gen2 Advisors, LLC**

### **Form ADV Part 2B – Individual Disclosure Brochure**

*for*

### **Margaret Laughton Bilby**

Personal CRD Number: 5011099

Investment Adviser Representative

Gen2 Advisors, LLC  
160 E Trotters Drive  
Maitland, FL 32751  
(407) 310-7609  
[maggie@gen2-advisors.com](mailto:maggie@gen2-advisors.com)

UPDATED: 06/11/2025

## Item 2: Educational Background and Business Experience

**Name:** Margaret Laughton Bilby **Born:** 1985

### **Educational Background and Professional Designations:**

#### **Education:**

MBA Business, University of Florida - 2014

Bachelors of Arts Economics and English Literature, Emory University - 2007

#### **Designations:**

##### **CFP® - Certified Financial Planner**

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.

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 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:

- i. 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
- ii. 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.

### **Business Background:**

06/2025 – Present	Managing Member and Chief Compliance Officer Gen2 Advisors, LLC
03/2024 – 06/2025	Vice President & Wealth Advisor Cyndeo Wealth Partners
08/2015 - 04/2024	Relationship Manager David Vaughan Investments
05/2011 - 08/2015	Supervisor - Wealth Advisory USAA

### **Item 3: Disciplinary Information**

There are no legal or disciplinary events that are material to a client’s or prospective client’s evaluation of this advisory business.

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

Margaret Bilby is a Development Chair for Winter Park Day Nursery, a non-profit. This is a volunteer position.

## **Item 5: Additional Compensation**

Margaret Laughton Bilby does not receive any economic benefit from any person, company, or organization, other than Gen2 Advisors, LLC in exchange for providing clients advisory services through Gen2 Advisors, LLC.

## **Item 6: Supervision**

As the Chief Compliance Officer of Gen2 Advisors, LLC, Margaret Laughton Bilby supervises all activities of the firm. Margaret Laughton Bilby's contact information is on the cover page of this disclosure document. Margaret Laughton Bilby adheres to applicable regulatory requirements, together with all policies and procedures outlined in the firm's code of ethics and compliance manual.

## **Item 7: Requirements For State Registered Advisers**

*This disclosure is required by state securities authorities and is provided for your use in evaluating this investment advisor representative's suitability.*

A. Margaret Laughton Bilby has NOT been involved in any of the events listed below.

1. An award or otherwise being found liable in an arbitration claim alleging damages in excess of \$2,500, involving any of the following:
  - a) an investment or an investment-related business or activity;
  - b) fraud, false statement(s), or omissions;
  - c) theft, embezzlement, or other wrongful taking of property;
  - d) bribery, forgery, counterfeiting, or extortion; or
  - e) dishonest, unfair, or unethical practices.
2. An award or otherwise being found liable in a civil, self-regulatory organization, or administrative proceeding involving any of the following:
  - a) an investment or an investment-related business or activity;
  - b) fraud, false statement(s), or omissions;
  - c) theft, embezzlement, or other wrongful taking of property;
  - d) bribery, forgery, counterfeiting, or extortion; or
  - e) dishonest, unfair, or unethical practices.

B. Margaret Laughton Bilby has NOT been the subject of a bankruptcy.