



Part 2B of Form ADV: Firm Brochure

MR. BRYAN CRAIG WISDA  
MR. DANIEL SCOTT BRADDOCK  
MR. DAVID CHENG FANG  
ALMEGA WEALTH MANAGEMENT LLC

**ARIZONA**  
8426 E Country Club Trail  
Scottsdale, AZ 85255  
480-770-4700

**KENTUCKY**  
112 Mill Street  
Greenville, KY 42345  
270-820-2056

**KENTUCKY**  
312 S. 4<sup>th</sup> St., 7<sup>th</sup> Floor  
Louisville, KY 40202  
502-754-0001

**NORTH CAROLINA**  
129 Moore Avenue  
Mount Airy, NC 27030  
336-789-6241

**NORTH CAROLINA**  
8601 Six Forks Rd, 4<sup>th</sup> Floor  
Raleigh, NC 27615  
919-689-8986

Almega-Wealth.com

March 31, 2024

This Brochure Supplement provides information about our Investment Advisor Representatives that supplements Almega Wealth Management LLC's Firm Brochure. You should have received a copy of that Brochure. Please contact Mr. Wisda at 480-770-4700 or [bryan@almega-wealth.com](mailto:bryan@almega-wealth.com) if you did not receive our Brochure or if you have any questions about the contents of this supplement. The information in this brochure has not been approved or verified by the United States Securities and Exchange Commission or by any state securities authority. Additional information about our Investment Advisor Representatives is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

Additional information about Almega Wealth Management LLC and Mr. Wisda also is available on the SEC's website at <https://adviserinfo.sec.gov>. Registration does not imply any level of skill or training.

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BRYAN CRAIG WISDA, CFP®

<https://linkedin/in/bryanwisda>

ITEM 2 – EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Mr. Wisda is the President of, and an Investment Advisor Representative with, Almega Wealth Management LLC.

Year of Birth: 1977

Formal Education After High School:

University of Arizona, 1996 - 2000, Philosophy  
Boston University, 2005 - 2006, Financial Planning

Business Background Previous Ten Years:

Sept. 2021-Present, Almega Wealth Management LLC, President  
Aug. 2021-Dec. 2021, Southport Capital, 2021, Regional Director  
Apr. 2015- Aug. 2021, Self-Employed, Insurance Agent  
Sept. 2014- Aug. 2021, Maricopa County Sheriff’s Office, Deputy Sheriff  
July 2012-Apr. 2015, Summit Wealth Management of Arizona LLC, President  
Mar. 2007-July 2012, Summit Wealth Management, Senior Financial Planner  
Sept. 2001-Mar. 2007, UBS (fka PaineWebber), Financial Advisor

Professional Designations Held:

CERTIFIED FINANCIAL PLANNER™

The CERTIFIED FINANCIAL PLANNER™ (or CFP®) designation is awarded by the Certified Financial Planner Board of Standards. The current standards to be awarded this designation one must (1) have a bachelor’s degree (or higher) in any discipline, (2) must complete a CFP® board registered educational requirement through an accredited college program, (3) successfully pass the CFP® Certification Examination, (4) three years of full- time relevant personal financial planning experience, (5) disclosure of material facts and certify adherence to the CFP® Board’s Code of Ethics and Professional Responsibility as well as the CFP® Board’s Rules of Conduct and Financial Planning Practice Standards.

For renewal certification, the CFP® Board requires continued adherence to the CFP® Board’s Code of Ethics and Professional Responsibility as well as the CFP® Board’s Rules of Conduct and Financial Planning Practice Standards. Renewal certification also requires the completion of 30 hours of pre-approved continuing

education courses every two years, of which 2 hours must be on the topic of ethics.

#### NAPFA-Registered Financial Advisor

The designation “NAPFA-Registered Financial Advisor” is awarded by the National Association of Personal Financial Planners. The current standards to become a NAPFA-Registered Financial Advisor require (1) the employing firm to be a Fee-Only firm inasmuch as the firm is compensated solely by the client with neither the advisor nor any related party receiving compensation that is contingent on the purchase or sale of a financial product, (2) one may not own more than a 2% interest in, or be employed by, a financial services industry firm that receives transaction-based compensation, (3) abide by the NAPFA Code of Ethics, Standards of Membership and Affiliation, and Bylaws, (4) prompt disclosure of all material facts, (5) have a bachelor’s degree in any discipline, (6) be certified as either a CERTIFIED FINANCIAL PLANNER™ or CPA/PFS, and (7) complete a peer review of a financial planning engagement.

For renewal certification of the NAPFA-Registered Financial Advisor designation, the National Association of Personal Financial Planners requires continued adherence to the NAPFA Code of Ethics, Standards of Membership and Affiliation, and Bylaws and complete 60 hours of continuing education every two years. These continuing education requirements include a minimum of 5 credit hours in each of the following core areas: insurance & risk management, investments, income tax planning, retirement planning & employee benefits, estate planning, communication, and counseling. Additionally, 2 credit hours are required in ethics.

#### ITEM 3 – DISCIPLINARY INFORMATION

We are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. No information concerning Mr. Wisda is applicable to him.

#### ITEM 4 – OTHER BUSINESS ACTIVITIES

Mr. Wisda is the president of Zezz Music Limited LLC (2018-Present), an independent record label and producer of the ADHD Lullaby™ series of albums, and other musical works, to help children and adults with ADHD sleep. This is a non-investment-related business. He spends less than 6 hours per week on this activity and not during normal business hours. Mr. Wisda’s responsibilities to Zezz Music Limited include recording music, production of musical albums, marketing, and other general business ownership-related responsibilities. Zezz Music Limited LLC is located at 8426 E. Country Club Trail, Scottsdale, AZ 85255.

## ITEM 5 – ADDITIONAL COMPENSATION

Mr. Wisda does not receive any undisclosed economic benefits such as sales awards or prizes for providing advisory services.

Mr. Wisda is a Fee-Only fiduciary financial advisor and does not earn any transaction-based compensation. Furthermore, Mr. Wisda does not refer clients to employees or affiliates of Almega Wealth Management to implement his recommendations.

## ITEM 6 – MATERIAL CONFLICTS OF INTEREST

Mr. Wisda has no personal material conflicts of interest with clients of Almega Wealth Management.

## ITEM 6 – SUPERVISION

We monitor our investment adviser representatives and client accounts on a continuous and best-efforts basis and conduct formal reviews with our clients as specified in the client's Financial Services Agreement. Factors that might suggest an account review in addition to the scheduled reviews include, but are not limited to, changes in investment strategy, large deposits or withdrawals from the account, and changes in the client's financial situation.

Mr. Bryan Wisda is responsible for supervising our investment adviser representatives. His phone number is 480-770-4700. His email address is [bryan@almega-wealth.com](mailto:bryan@almega-wealth.com)

## ITEM 7 – REQUIREMENTS FOR STATE-REGISTERED ADVISORS

Mr. Wisda has never had to pay an award or otherwise been 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.

Mr. Wisda has never had to pay an award or otherwise been 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.

Mr. Wisda has never been the subject of a bankruptcy petition.

Additional information about Almega Wealth Management LLC and Mr. Wisda is also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) and [brokercheck.com](http://brokercheck.com).

# DANIEL SCOTT BRADDOCK

<https://linkedin.com/in/scottbraddock>

## ITEM 2 – EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Daniel Scott Braddock is a Solicitor for Almega Wealth Management and is registered as an Investment Advisor Representative.

Year of Birth: 1977

Formal Education After High School:

Liberty University, Aug 1996 – May 2001, Business  
Strayer University, Sept 2003 – June 2006, Business & Marketing

Business Background Previous Ten Years:

Jan. 2023-Present, Almega Wealth Mgmt., Investment Advisor Representative  
Jan. 2003-Present, Scott Braddock Financial, Insurance Agent (Owner)  
July 2018-Nov. 2021, Southport Capital, Solicitor

Professional Designations & Certifications Held:

### NATIONAL SOCIAL SECURITY ADVISOR™

The NATIONAL SOCIAL SECURITY ADVISOR™ certification is awarded by the National Social Security Association. The current standards to be awarded this certification, one must (1) complete the educational requirement, and (2) pass a proctored exam with a score of 79% or higher.

For renewal certification, the National Social Security Association requires the completion of eight (8) hours of approved continuing education every two years.

### FEDERAL RETIREMENT CONSULTANT™

The FEDERAL RETIREMENT CONSULTANT™ designation is awarded by the Federation of Federal Employee Benefit Advocates. The current standards to be awarded this designation one must (1) complete the educational requirement and (2) pass a proctored exam.

For renewal certification, the Federation of Federal Employee Benefit Advocates requires the completion of six (6) hours of approved continuing education annually.

### ITEM 3 – DISCIPLINARY INFORMATION

We are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice.

From 2018 to 2021, Mr. Braddock worked as a Solicitor for Southport Capital. Unbeknownst to Mr. Braddock, Southport Capital failed to register him as an Investment Advisor Representative. When Mr. Braddock became aware of the error, he brought it to the attention of the State of North Carolina. Ultimately, he paid \$8,500 in fines & fees to the State of North Carolina for the unregistered activity. Subsequently, the State of North Carolina promptly registered Mr. Braddock as an Investment Advisor Representative with Almega Wealth Management.

### ITEM 4 – OTHER BUSINESS ACTIVITIES

Mr. Braddock is the president of Scott Braddock Financial LLC (2003-Present), an independent insurance agency.

This is a non-investment-related business.

This is Mr. Braddock's primary job. He spends approximately 95% of his working hours on this activity, but not during hours while working for Almega Wealth Management. Mr. Braddock's responsibilities to Scott Braddock Financial include sales and service of insurance products and managing subordinate insurance agents. Scott Braddock Financial is located at 8601 Six Forks Road, Raleigh, NC 27615.

### ITEM 5 – ADDITIONAL COMPENSATION

Mr. Braddock does not receive any undisclosed economic benefits such as sales awards or prizes for providing advisory services as an employee of Almega Wealth Management.

Mr. Braddock may earn commissions on the sale of insurance products sold through Scott Braddock Financial by himself and other employees of Scott Braddock Financial.

### ITEM 6 – MATERIAL CONFLICTS OF INTEREST

The business activities of Scott Braddock Financial may create a material conflict of interest with Almega Wealth Management as well as with the clients that Mr. Braddock solicits for Almega Wealth Management. The sale of certain insurance products to clients of Scott Braddock Financial, who are also clients of Almega, potentially reduces the assets under management of Almega Wealth Management. Furthermore, the sale of any insurance product which pays a commission to the insurance agent creates an inherent conflict of interest. Mr. Braddock is prohibited from selling any new insurance or financial products to individuals/entities once they become a client of Almega Wealth Management. For further

information regarding these material conflicts of interest, please contact our Chief Compliance Officer, Bryan Wisda, by calling 480-770-4700 or emailing [info@almea-wealth.com](mailto:info@almea-wealth.com).

#### ITEM 7 – SUPERVISION

We monitor our investment adviser representatives and client accounts on a continuous and best-efforts basis and conduct formal reviews with our clients as specified in the client's Financial Services Agreement. Factors that might suggest an account review in addition to the scheduled reviews include, but are not limited to, changes in investment strategy, large deposits or withdrawals from the account, and changes in the client's financial situation. Mr. Bryan Wisda is responsible for supervising our Investment Adviser Representatives. His phone number is 480-770-4700.

#### ITEM 8 – REQUIREMENTS FOR STATE-REGISTERED ADVISORS

Mr. Braddock has never had to pay an award or otherwise been 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.

Mr. Braddock paid \$8,500 in fines and fees to the State of North Carolina in 2022 for unregistered investment-related business activity from 2018-2021. For more information, please see Item 3 – Disciplinary Information.

Mr. Braddock has never paid an award or otherwise been found liable in a civil, self-regulatory organization, or administrative proceeding involving any of the following: (a) fraud, false statement(s), or omissions; (b) theft, embezzlement, or other wrongful taking of property; (c) bribery, forgery, counterfeiting, or extortion; or (d) dishonest, unfair, or unethical practices.

Mr. Braddock has never been the subject of a bankruptcy petition.

Additional information about Almea Wealth Management LLC and Mr. Braddock is also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) and or [brokercheck.com](http://brokercheck.com).



DAVID CHENG FANG

<https://linkedin.com/in/david-fang-10348419>

ITEM 2 – EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

David Cheng Fang is an Associate Financial Advisor for Almega Wealth Management and is registered as an Investment Advisor Representative.

Year of Birth: 1990

Formal Education After High School:

McCombs Business School at Univ. of Texas, 2015-2016, MBA Candidate  
Washington University in St. Louis, 2008-2012, Economics & Mathematics

Business Background Previous Ten Years:

Mar. 2024-Present, Almega Wealth Management, Investment Advisor Representative  
Dec. 2023-Present, Dexafit, Management Consultant  
Dec. 2023-Mar. 2024, Almega Wealth Management, Operations Manager  
Apr. 2023-Nov. 2023, Unemployed  
Apr. 2022-Mar. 2023, Poggio Labs, Project Manager  
Apr. 2021-Apr. 2022, CaptivateIQ, Project Manager  
Nov. 2019-Mar. 2021, Self-Employed  
Oct. 2018-Oct. 2019, Figure Technologies, Product Manager  
June 2016-Sept. 2018, SoFi, Product Manager  
July 2015-Aug. 2016, Univ. of Texas, MBA Student  
May 2014-June 2015, ITE, Operations  
Aug 2012-Apr. 2014, Deloitte, Business Analyst

Professional Designations & Certifications Held:

None

ITEM 3 – DISCIPLINARY INFORMATION

We are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. No information concerning Mr. Fang is applicable to him.

ITEM 4 – OTHER BUSINESS ACTIVITIES

Mr. Fang is a contracted management operations consultant for DexFit, a healthcare consulting company located in Scottsdale, Arizona. This is a non-investment-related business. He spends

approximately 8 working hours weekly on this activity, but not during hours while working for Almega Wealth Management.

#### ITEM 5 – ADDITIONAL COMPENSATION

Mr. Fang does not receive any undisclosed economic benefits such as sales awards or prizes for providing advisory services.

Mr. Fang is a Fee-Only fiduciary financial advisor and does not earn any transaction-based compensation. Furthermore, Mr. Fang does not refer clients to employees or affiliates of Almega Wealth Management to implement his recommendations.

#### ITEM 6 – MATERIAL CONFLICTS OF INTEREST

Mr. Fang has no personal material conflicts of interest with clients of Almega Wealth Management.

#### ITEM 7 – SUPERVISION

We monitor our investment adviser representatives and client accounts on a continuous and best-efforts basis and conduct formal reviews with our clients as specified in the client's Financial Services Agreement. Factors that might suggest an account review in addition to the scheduled reviews include, but are not limited to, changes in investment strategy, large deposits or withdrawals from the account, and changes in the client's financial situation. Mr. Bryan Wisda is responsible for supervising our Investment Adviser Representatives. His phone number is 480-770-4700.

#### ITEM 8 – REQUIREMENTS FOR STATE-REGISTERED ADVISORS

Mr. Fang has never had to pay an award or otherwise been 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.

Mr. Fang has never had to pay an award or otherwise been 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.

Mr. Fang has never been the subject of a bankruptcy petition.

Additional information about Almega Wealth Management LLC and Mr. Braddock is also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) and or [brokercheck.com](http://brokercheck.com).