Part 2B of Form ADV: Firm Brochure

MR. BRYAN CRAIG WISDA
MR. DANIEL SCOTT BRADDOCK
MR. COLIN FRANK TAYLOR
MR. COLIN JOSEPH BYBEE

ALMEGA WEALTH MANAGEMENT LLC

ARIZONA	**KENTUCKY**	**KENTUCKY**	**NORTH CAROLINA**	**NORTH CAROLINA**
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Almega-Wealth.com

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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 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.

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® EA

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.

IRS Enrolled Agent

An Enrolled Agent, or EA, is a federally authorized tax practitioner who has earned the privilege of representing taxpayers before the Internal Revenue Service. The designation may be obtained by passing a three-part comprehensive IRS examination covering individual and business tax returns, or through qualifying prior experience as an IRS employee. Enrolled Agents have unlimited practice rights before the IRS, meaning they may represent taxpayers before the IRS with respect to audits, collections, appeals, and other federal tax matters. Enrolled Agents must comply with applicable ethical standards, including Treasury Department Circular 230, and must complete continuing education requirements to maintain the designation. The IRS requires Enrolled Agents to complete 72 hours of continuing education every three years.

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 insomuch 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

The State of Indiana does not require a Registered Investment Advisor (RIA) or Investment Advisor Representative (IAR) to register with the state securities division if the RIA or IAR serves five (5) or fewer clients who reside in the state. This is referred to as the *De Minimis Rule*. In

2024, Almega Wealth Management and Bryan Wisda accepted a 6th client before registering. When discovered, Mr. Wisda self-reported the error to the state's regulators. Subsequently, Almega Wealth Management and Mr. Wisda were required to sign a Consent Decree and pay a $4,000 fine by the State of Indiana in May 2025.

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 2 hours per week on this activity and not during regular 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.

Mr. Wisda serves on the Western Regional Board for the National Association of Personal Financial Planners (NAPFA). His term will terminate in September 2027. He is also a member of the national membership committee. He is expected to attend board meetings, committee meetings, and various trainings. This is a non-investment-related business. He expects to spend less than 2-4 hours per week on this activity, which may coincide with Almega Wealth Management's normal business hours.

Mr. Wisda is the President of Almega Tax LLC. Almega Tax LLC was formed to provide clients of Almega Wealth Management with tax preparation services, tax planning, and IRS audit representation. He expects to spend 8-12 hours per week (during tax season) and 4-8 hours per week (during off-season) on this activity, which may coincide with Almega Wealth Management's normal business hours.

Mr. Wisda is the President of Wisda Family Management Inc., the management company for Mr. Wisda's personal assets, including Almega Wealth Management and Almega Tax LLC. He expects to spend approximately 1 hour per week on this activity, not during Almega Wealth Management's normal business hours.

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.

All compensation for advisory services Mr. Wisda receives from Almega Wealth Management and/or Almega Tax LLC is solely derived from client fees outlined in the client's advisory agreement.

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

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.

Almega Wealth Management, and Bryan Craig Wisda, signed a Consent Decree with the State of Indiana and paid a $4,000 fine in May 2025 for exceeding the *De Minimis* number of clients served, an administrative violation. For more information, please see Item 3 – Disciplinary Information.

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) 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 and brokercheck.com.

DANIEL SCOTT BRADDOCK

https://linkedin.com/in/scottbraddockfin

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 with Almega Wealth Management pursuant to the laws of the State of North Carolina for Solicitors.

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., Solicitor
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. 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. Almega Wealth Management does not refer its clients to Mr. Braddock to implement any insurance recommendations. Mr. Braddock is prohibited from receiving any outside compensation from clients of Almega Wealth Management. Any insurance-related compensation Mr. Braddock receives after a person(s) becomes a client of Almega Wealth Management is based on activity completed/contracted before the client's advisory engagement with Almega Wealth Management.

All compensation for advisory services Mr. Braddock receives from Almega Wealth Management is solely derived from client fees outlined in the client's advisory agreement.

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 that 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@almega-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 Almega Wealth Management LLC and Mr. Braddock is also available on the SEC's website at www.adviserinfo.sec.gov and or brokercheck.com.

COLIN FRANK TAYLOR

https://www.linkedin.com/in/colin-taylor-83286121

ITEM 2 – EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Colin Frank Taylor is a Financial Advisor for Almega Wealth Management and is registered as an Investment Advisor Representative.

Year of Birth: 1981

Formal Education After High School:

University of North Carolina at Wilmington, 2010-2011, Masters in Accounting
University of North Carolina at Wilmington, 2006-2010, Accounting & Finance

Business Background Previous Ten Years:

June. 2024-Present, Almega Wealth Management, Investment Advisor Representative
Jan. 2024-Apr. 2024, Raleigh Capital Management, Investment Advisor Representative
Oct. 2020-Dec. 2023, Guardian Wealth Advisors, Investment Advisor Representative
Jan. 2019-Oct. 2020, Aptus Capital Advisors, Investment Advisor Representative
Dec. 2018-Feb. 2019, Gordon Asset Management, Investment Advisor Representative
May. 2016-Apr. 2018, Northbound Exec. Search, Recruiter
Jan. 2014-May. 2016, KPMG, Senior Consultant (Public Audit)

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. Taylor is applicable to him.

ITEM 4 – OTHER BUSINESS ACTIVITIES

Mr. Taylor does not have any securities-related outside business activities and has no non-securities-related outside business activities that coincide with Almega Wealth Management's regular business hours.

ITEM 5 – ADDITIONAL COMPENSATION

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

Mr. Taylor is a Fee-Only fiduciary financial advisor and does not earn any transaction-based compensation.

All compensation for advisory services Mr. Taylor receives from Almega Wealth Management is solely derived from client fees outlined in the client's advisory agreement.

ITEM 6 – MATERIAL CONFLICTS OF INTEREST

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

Additional information about Almega Wealth Management LLC and Mr. Taylor is also available on the SEC's website at www.adviserinfo.sec.gov and or brokercheck.com.

COLIN JOSEPH BYBEE

https://www.linkedin.com/in/colin-bybee

ITEM 2 – EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Colin Joseph Bybee is a Financial Advisor for Almega Wealth Management and is registered as an Investment Advisor Representative.

Year of Birth: 2004

Formal Education After High School:

California Baptist University, 2023-2026, Finance
Ottawa University, 2022-2023, Undeclared

Business Background Previous Ten Years:

May 2026-Present, Almega Wealth Management, Financial Advisor
May 2025-August 2025, Almega Wealth Management, Summer Intern

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. Bybee is applicable to him.

ITEM 4 – OTHER BUSINESS ACTIVITIES

Mr. Bybee does not have any securities-related outside business activities and has no non-securities-related outside business activities that coincide with Almega Wealth Management's regular business hours.

ITEM 5 – ADDITIONAL COMPENSATION

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

Mr. Bybee is a Fee-Only fiduciary financial advisor and does not earn any transaction-based compensation.

All compensation for advisory services Mr. Bybee receives from Almega Wealth Management is solely derived from client fees outlined in the client's advisory agreement.

ITEM 6 – MATERIAL CONFLICTS OF INTEREST

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

Additional information about Almega Wealth Management LLC and Mr. Bybee is also available on the SEC's website at www.adviserinfo.sec.gov and or brokercheck.com.