

This brochure supplement provides information about Gregory Lee Luken that supplements the Luken Wealth Management brochure. You should have received a copy of that brochure. Please contact Gregory Lee Luken if you did not receive Luken Wealth Management's brochure or if you have any questions about the contents of this supplement.

Additional information about Gregory Lee Luken is also available on the SEC's website at www.adviserinfo.sec.gov.

Luken Wealth Management
Form ADV Part 2B – Individual Disclosure Brochure
for

Gregory Lee Luken
Personal CRD Number: 1860579
Investment Advisor Representative

Luken Wealth Management
136 Frierson Street
Brentwood, TN 37027
(615) 550-5570
greg@luken.pro

UPDATED: 12/4/2024

Item 2: Educational Background and Business Experience

Name: Gregory Lee Luken **Born:** 1962

Educational Background and Professional Designations:

Education:

Bachelor of Arts, English, Baylor University - 1987

Business Background:

| | |
|-------------------|---|
| 05/2013 - Present | Investment Advisor Representative & President Luken Wealth Management |
| 05/2003-10-2017 | Registered Representative/IAR SII Investments, Inc. |
| 11/1999- 12/2003 | President Luken Investment Group, Inc. |

Gregory Lee Luken is also licensed insurance producer and agent.

Item 3: Disciplinary Information

There is no disciplinary information to report.

Item 4: Other Business Activities

Gregory Lee Luken is President of Luken Investment Analytics and a licensed insurance agent. From time to time, he will offer clients advice or products from this activity. Clients should be aware that insurance products may pay a commission and could involve a possible conflict of interest, as commissionable products can conflict with the fiduciary duties of a registered investment advisor. Luken Wealth Management always acts in the best interest of the client; including in the sale of commissionable insurance products to advisory clients. Clients are in no

way required to implement the plan or purchase any insurance product through any representative of Luken Wealth Management.

Mr. Luken acts as Trustee for his nephew's Trust account. He is not compensated for his duties in this capacity.

Mr. Luken owns rental property and receives rental payments in this capacity.

Item 5: Additional Compensation

Other than regular compensation through Luken Investment Analytics, Gregory Lee Luken does not receive any economic benefit from any person, company, or organization, in exchange for providing clients advisory services through Luken Wealth Management.

Item 6: Supervision

Gregory Lee Luken is supervised by Carri Sanford, CCO. She reviews all client contracts and oversees the compliance for the advisory activities of the firm. Carri Sanford can be reached at the address and phone number on the cover page of this disclosure document or by emailing carri@lukenanalytics.com

Item 7: Requirements For State Registered Advisors

This disclosure is not required of SEC registered investment advisers.