

Item 1: Cover Page

Part 2B of Form ADV: Brochure Supplement

Date: 01/03/2024

Brett Josey Wealth Management LLC

716 Smokehouse Loop

Benton, La. 71006

(318)658-9997 (Phone)

bjwmlc@gmail.com (Email)

Supervisor: Brett Josey

Supervised Person:

Caleb Josey

(318)210-8018 (Phone)

This brochure supplement provides information about Caleb Josey that supplements the Brett Josey Wealth Management LLC. brochure. You should have received a copy of that brochure. Please contact Brett Josey if you did not receive Brett Josey Wealth Management LLC'S brochure or if you have any questions about the contents of this supplement.

Additional information about Caleb Josey is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2: Educational Background and Business Experience

Caleb Josey date of birth 08/05/1994

Education

Bachelor of Science in Accounting, May 2017; Honor Graduate with 3.50 overall GPA

Louisiana State University - Shreveport

Master's in Business Administration, August 2018- 3.50 GPA

Louisiana State University - Shreveport

Honors - Louisiana State University - Shreveport

Beta Gamma Sigma – International Honor Society for Collegiate Schools of Business

Phi Kappa Phi – Honor Society

Winner of LSU-S School of Business Research Forum

Chancellor's List

Dean's List

Series 65 Uniform Investment Adviser Law Exam passed May 2020

Business Experience

Heard, McElroy, & Vestal, LLC CPA

February 1st-April 16th, 2018 – Tax Internship. Offered full time position.

BancorpSouth

January-March 2019 Commercial Banking/Credit Analyst training program

Brett Josey Wealth Management LLC

September 1, 2019- May 29, 2020:

Administrative/Clerical position supporting Brett Josey Wealth Management LLC

May 30, 2020 to Present:

Investment Advisor Representative of Brett Josey Wealth Management LLC

Item 3: Disciplinary Information

There is no disciplinary information to report.

Item 4: Other Business Activities

There are no other business activities to report.

Item 5: Additional Compensation

There is no other compensation to report.

Item 6: Supervision

Brett Josey supervises all persons named in this Form ADV Part 2B Investment Adviser Brochure Supplement. As the owner of Brett Josey Wealth Management LLC, Brett in effect supervises Caleb Josey. Brett supervises by reviewing all trades, all transactions in all accounts, all client correspondence as well as employees' personal securities transactions and holding reports. The team environment that Brett and Caleb work in makes supervision and review virtually continuous. Brett Josey may be reached at (318)658-9997.