

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:

Brett Josey

This brochure supplement provides information about Brett 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 Brett Josey is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2: Educational Background and Business Experience

Brett Josey date of birth 09/25/1961

Education

B. S. Undergraduate degree in Business Administration from Louisiana Tech University. Graduated in 1983

MBA with an emphasis on Finance/Investments from Louisiana Tech University. Obtained while working full time. Graduated in 1988

Texas School of Trust Banking. This was a one-week school. It was a precursor to attending the ABA National Trust School. Completed 1986

ABA National Trust School at Northwestern University in Evanston, Illinois. This entailed a two-week intensive course study and exam. Scored over 90% on the exit exam in 1988 and therefore achieved the award of Honor Graduate.

ABA National Graduate Trust School at Northwestern University in Evanston, Illinois. This school is only for those who have completed the National Trust School. It is a two-year intensive study. Requirements include a comprehensive exam each year. In addition, five case studies must be completed during each year. It takes an average of 15-20 hours to complete each case study. Experienced industry practitioners evaluate each case study and provide individual feedback. Each case study ranged in length from approximately 15-20 typed pages. The areas covered included Investments, Fiduciary Law, Income Taxation, Estate Taxation, Life Insurance, Employee Benefits, Financial Planning, Charitable Giving, Post-Mortem Planning, and Ethics. A score over 90% was achieved on all exams and case studies. As a result, the Honor Graduate award was achieved and two additional designations were awarded. Those designations were Certified Trust and Financial Adviser and Certified Financial Services counselor.

NASD Series 7 Exam passed March 1997

Completed the College for Financial Planning Certified Financial Planner Professional Education Program January 1998.

Series 65 Uniform Investment Adviser Law Exam Passed December 2011

Business Experience

1983 Personal Trust Administrator for First National Bank of Shreveport

1986 Personal Trust Officer Louisiana Bancshares (Still the same bank/Name Change post-merger)

1988 Assistant Vice President and Trust Officer Premier Bank (Still the same bank/Name Change)

1990 Assistant Vice President and Trust Officer for Commercial National Bank in Shreveport

1992 Vice President and Trust Officer Deposit Guaranty Bank (Still the same bank/Name Change post-merger.)

1994 Named Sales and Marketing Manager while continuing to serve the most complex and highest wealth clients of the personal trust department.

1998 to Present: Owner and Investment Adviser 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 is responsible for supervising Brett 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. Brett Josey may be reached at (318)658-9997.