



Olde Wealth Management, LLC

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425-495-7484

FIRM BROCHURE (ADV Part 2A-2B)

March 19, 2024

This brochure provides information about the qualifications and business practices of Olde Wealth Management, LLC ("OWM"). For any questions about the contents of this brochure, please contact us at 425-495-7484 or email Micah Brooks, our Chief Compliance Officer at micah@oldewealth.com.

The information in this brochure has not been approved or verified by the United States Securities and Exchange Commission ("SEC") or by any state securities authority. Additional information about OWM is available on the SEC's website at www.adviserinfo.sec.gov and our CRD number is 308991.

Olde Wealth Management, LLC is a registered investment advisor. Registration as an investment advisor does not imply any certain level of skill or training.

Item 2 - Summary of Material Changes

This brochure follows our last update of March 20, 2023, and updates our assets under management. Additionally, we have increased our minimum fee as noted in Item 7. We have also removed any information on insurance sales as we are no longer providing any of those services.

In the future, this section will discuss specific material changes that are made to the Brochure and provide clients with a summary of such changes. Following the SEC and state rules, we will ensure that clients receive a summary of any materials changes to this and subsequent Brochures within 120 days of the close of the Advisor's fiscal year. We will provide other ongoing disclosure information about material changes as necessary.

Our Brochure may be requested by contacting Micah Brooks, Chief Compliance Officer of Olde Wealth Management, LLC at 425-658-0821 or by emailing micah@oldewealth.com. Our Brochure is always provided free of charge.

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Item 4– Advisory Business

Olde Wealth Management, LLC (“OWM”), formerly known as Financial Network Wealth Management LLC, is an investment advisor registered with the Securities Exchange Commission (SEC) and was founded to provide advisory services in 2020. Denton Olde is the principal owner of the firm. OWM provides clients (“Clients”) Asset Management and Financial Consulting.

Clients may impose restrictions on investing in certain securities, industries, or sectors, but must advise of any such restrictions in writing. OWM provides tailored advisory services to meet Client needs, so it is possible that clients with similar needs and objectives have different investments. OWM relies on the information provided by Clients to determine the investments selected, so it is important that Clients provide all requested information and details on any changes in their financial situation.

Asset Management

OWM offers discretionary asset management services for Clients, although some existing client assets are managed on a non-discretionary basis. With discretion we have the authority to execute transactions in the account without seeking Client approval on each transaction. On a non-discretionary basis, we will obtain prior Client approval before executing any transactions.

OWM will offer Clients ongoing asset management services after determining individual investment goals, time horizons, objectives, and risk tolerance. Ongoing Asset Management includes investment strategies, investment selection, asset allocation and portfolio monitoring.

Please review Item 8 for a description of our investment strategy. Some of our existing Clients participate in our Sponsored Wrap Fee program and more information on that is provided in the Wrap Fee Brochure (Appendix 1). Accounts in the Wrap Fee program are not invested or managed differently than accounts not under the Wrap Fee program.

Financial Consulting

Financial Planning may be included with Asset Management, but standalone Financial Planning for a fee is available through our Financial Consulting. All Clients have different circumstances and situations requiring unique financial planning services that may include investment planning; retirement planning; legacy planning; charitable planning; life insurance; retirement account recommendations; estate planning; tax concerns and planning; college planning; business planning; and debt/credit planning. Written financial plans or financial consultations provided to Clients by OWM usually include general recommendations for a course of activity or specific actions to be taken by Clients. It is ultimately the decision of the Client to act on recommendations provided by OWM.

As of December 31, 2023, we managed \$284,234,613, which includes \$58,981,698 on a non-discretionary basis and \$225,252,916 on a discretionary basis.

Item 5 - Fees and Compensation

Asset Management

OWM charges fees (“Advisory Fees”) for Asset Management, which is typically calculated and paid on a quarterly basis and in advance based on a percentage of the market value of the assets being managed. Our standard Advisory Fee schedule is as follows:

Advisory Fee	Assets Managed
1.00%	on the first \$700,000, plus
0.70%	on the next \$1,300,000, plus
0.50%	on amounts over \$2,000,000

Advisory Fees may be negotiable and existing clients may be on a different fee schedule, although in no case does any client pay us Advisory Fees more than 1.00% annually. Fees are debited directly from Client accounts although we may have some clients who pay through a third-party electronic payment provider. Cash flows greater than \$10,000 in or out of the accounts are prorated and paid or credited on the following quarterly billing. Any new accounts are prorated for the period they were open. When a client leaves OWM we will refund the unused portion of the Advisory Fee that was charged in advance.

Some Clients may select fixed Advisory Fees (“Fixed Fees”) for Asset Management. The amount charged for Fixed Fees can be up to \$25,000 annually, depending on the amount and complexity of the Client assets, investments, sophistication, etc. If a Client opts for Fixed Fees, they will be charged quarterly and in advance.

Financial Consulting

Financial planning services provided as a standalone service will be billed at an hourly rate of \$250 per hour (“Hourly Planning”) or at a flat annual rate (“Flat Rate”) of up to \$25,000, based on the complexity of the Clients financial situation and the number of financial goals to be addressed. It is up to the sole discretion of OWM to accept Clients for Financial Consulting, as our practice primarily consists of Asset Management. Any fees charged for Hourly Planning or Consulting will be disclosed in the Financial Consulting agreement (“Consulting Agreement”) signed by the Client. The fee charged for Hourly Planning or Consulting are typically charged in advance and on at minimum a quarterly basis or upon completion/delivery of the financial plan to the Client. There may be some clients who pay Financial Consulting fees in arrears.

Clients pay brokerage transaction costs and other charges directly to the custodian, unless enrolled in a wrap fee program. See Item 12 – Brokerage Practices. Clients may be required to pay, in addition to the OWM Advisory Fee, a proportionate share of any exchange traded funds or mutual fund’s fees and charges. For example, Mutual fund operating expenses are paid out of the fund and are in addition to our Advisory Fees and any transaction fees charged by the custodian.

If OWM has provided the Client a copy of its Form ADV Part 2 less than forty-eight hours prior to entering any investment advisory contract or if OWM provided the Client a copy of its Form ADV Part 2 at the time of entering into the advisory agreement, then the Client may terminate the advisory agreement without penalty within five business days after entering the contract. Alternatively, the investment advisory agreement may be terminated at any time by either party by providing 15 days written notice to the other party. Any unused or unearned Advisory Fee charged by OWM in advance will be rebated upon a notice of termination by the Client.

Item 6 - Performance-Based Fees and Side-By-Side Management

We do not charge fees that are based upon a share of capital gains or capital appreciation of Assets.

Item 7 - Types of Clients

OWM generally provides investment advice to individuals, high net worth individuals, trusts, estates, or charitable organizations, corporations, or business entities. Client relationships vary in scope and length of service. OWM requires a minimum of \$100,000 to open an account, although in some situations the minimum account size may be lowered or waived.

Item 8 - Methods of Analysis, Investment Strategies and Risk of Loss

Methods of Analysis

Our investment philosophy is based upon Modern Portfolio Theory (“MPT”). MPT states that assets should be selected based on how they interact with one another, rather than how they perform in isolation.

Additionally, we utilize numerous sources of information to provide advice, including but not limited to financial newspapers and magazines, websites, research materials and software prepared by third parties, annual reports, prospectuses and filings with the SEC, company press reports, as well as our proprietary analysis of data and information.

It is important to know that all methods of analysis include specific risks, including timing errors, inaccurate information, economic impacts, and other factors that can impact client investment performance.

Investment Strategies

We may utilize long-term purchases (securities held at least a year) and short-term purchases (securities sold within a year) when implementing investment advice. Short term purchases may increase costs and may also increase the tax obligation of the portfolio. Investments may also be made on margin, which may increase the costs due to the interest payments on the margin loan balance. Option strategies may also be implemented, which carries the risk of expiration with no value, as well as called equity positions, which could create a risk of taxation.

The types of securities include, but are not limited to the following: equities, fixed income (corporate debt, municipal bonds, certificates of deposit, etc.), mutual funds, unit investment trusts, options, exchange traded funds, U.S. Government issues securities, real estate investment trusts, limited partnerships, direct participation programs, variable annuities, variable life insurance and fixed annuities. We only sell annuities and life insurance policies where we are licensed and/or registered.

Risks

We use our best judgment and good faith efforts in rendering services to Client. We cannot warrant or guarantee any particular level of account performance, or that an account will be profitable over time. Not every investment recommendation we make will be profitable. Investing in securities involves risk of loss that Clients should be prepared to bear. Clients assume all market risk involved in the investment of account assets. Investments are subject to various market, currency, economic, political, and business risks. Risks to consider include, but are not limited to the following:

Financial Consulting: Risks associated with the Financial Consulting process include the possibility that the investment performance, interest rates, inflation assumptions, and longevity assumptions used in the development of client's financial plan turn out to be materially different than the actual future investment performance, interest rate, inflation and life span. Differences between the assumptions used in the plan and actual events can materially affect the results of the financial plan over long periods of time. While we base our assumptions on historical information, clients must acknowledge that past performance or events might not be indicative of future returns.

Investing: Investing is not without risk and involves the risk of loss of principal which clients should be prepared to bear. We use several strategies to try to reduce risk, including diversifying a portfolio across multiple asset classes. Despite these strategies, every asset class has experienced severe declines in value, sometimes over many years.

Asset Class Risk: Securities in client portfolios or in underlying investments such as mutual funds may underperform in comparison to the general securities markets or other asset classes.

Issuer Risk: Client account performance depends on the performance of individual securities selected in client accounts. Any issuer may perform poorly or be unable to continue operations, causing the value of its securities to decline or default.

Management Risk: The performance of client accounts is subject to the risk that our investment management strategy may not produce the intended results.

Market Risk: Client accounts can lose money over short periods due to short-term market movements and over longer periods during market downturns. The value of a security may decline due to general market conditions, economic trends, or events that are not specifically related to the issuer of the security or to factors that affect a particular industry or industries.

Passive Investment Risk: We may use a passive investment strategy that is not actively managed where we do not attempt to take defensive positions in declining markets.

Liquidity Risk: A security may not be able to be sold at the time desired which can impact performance.

Interest Rate Risk: An increase in interest rates may cause the value of fixed income securities and funds that hold these securities to decline in value. Securities with longer durations tend to be more sensitive to interest rate changes, usually making them more volatile than securities with shorter durations.

Inflation Risk: When any type of inflation is present, a dollar today will not buy as much as a dollar next year, because purchasing power is eroding at the rate of inflation.

Currency Risk: Overseas investments are subject to fluctuations in the value of the dollar against the currency of the investment's originating country. This is also referred to as exchange rate risk.

Reinvestment Risk: This is a risk that future proceeds from fixed income investments may have to be reinvested at a potentially lower rate of return (i.e. interest rate).

Business Risk: These risks are associated with a particular industry or a particular company within an industry.

Financial Risk: Excessive borrowing to finance a business' operations increases the risk of profitability, because the company must meet the terms of its obligations in good times and bad.

Options Risk: The risks involved with trading options are that they are very time sensitive investments. An options contract is generally a few months. The buyer of an option could lose his or her entire investment even with a correct prediction about the direction and magnitude of a particular price change if the price change does not occur in the relevant time period (i.e., before the option expires). Additionally, options are less tangible than some other investments. An option is a “book-entry” only investment without a paper certificate of ownership. Options written against an investment holding could force a sell of the position, which could create tax burdens and/or the unwanted liquidation of a position.

Except as may otherwise be provided by law, we are not liable to Clients for (1) any loss that Clients may suffer by reason of any investment recommendation we made with that degree of care, skill, and diligence under the circumstances that a prudent person acting in a fiduciary capacity would use; or (2) any independent act or failure to act by a custodian of Client accounts. It is the responsibility of the Client to give us complete information and to notify us of any changes in financial circumstances or goals.

Item 9 - Disciplinary Information

OWM is required to disclose all material facts regarding any legal or disciplinary event that would be material to your evaluation of our firm, or the integrity of our management. No such disclosable event exists.

Item 10 - Other Financial Industry Activities and Affiliations

We have no other industry activities or affiliations.

Item 11 - Code of Ethics, Participation or Interest in Client Transactions and Personal Trading

We have implemented policies and procedures to govern our employees and to mitigate the conflicts of interest we encounter when providing our advisory services to clients. These include:

- A Code of Ethics that each employee is required to review and sign an acknowledgement of receipt and understanding (upon hire, and annually);
- Prohibitions on the misuse of material non-public information.
- Personal securities trading policies and procedures (governing not only our employee but also the members of their household and any other securities or brokerage accounts where they have beneficial ownership of with a spouse, family member or other person). Employees are not allowed to:
 - Trade on inside information.
 - “Front-run” or trade in anticipation of client transactions.
 - Trade or participate in any activity prohibited under the federal securities laws.
 - Place their interests in front of clients.

We strive to achieve the highest ethical and fiduciary standards (in dealing with Clients, the public, vendors, prospective clients and each other). As a fiduciary, we have an affirmative duty to act with integrity, competence and care; this includes disclosing all potential and actual conflicts of interest.

It may be possible for our employees to buy or sell securities in their personal accounts that were also purchased in client accounts. We have a strict policy against using the trade flow of clients to economically benefit the employees or OWM. We monitor the transactions of employee accounts to protect clients from violation of our Code of Ethics.

We provide services for various other clients. We may give advice or take actions for our clients that differ from the advice given to other clients. The timing or nature of any action taken for all clients or other sponsors may also vary. For more information or to request a copy of our Code of Ethics, please contact us at 425-495-7484.

Item 12 - Brokerage Practices

OWM recommends that Clients establish brokerage accounts with the Charles Schwab & Co. division of Charles Schwab & Co., Inc.¹ ("Schwab"), a FINRA registered broker-dealer and SIPC member, to maintain custody of Clients' assets and to effect trades for their accounts. OWM is independently owned and operated and not affiliated with Schwab. OWM has evaluated Schwab and believes that it will provide our Clients with a blend of execution services, commission costs and professionalism that will assist our firm in meeting our fiduciary obligations to Clients.

Schwab provides OWM with access to its institutional trading and custody services, which are typically not available to Schwab retail investors. These services generally are available to independent investment advisers on an unsolicited basis, at no charge to them so long as a total of at least \$10 million of the adviser's Clients' assets are maintained in accounts at Charles Schwab & Co. These services are not contingent upon our firm committing to Schwab any specific amount of business (assets in custody or trading commissions). Schwab's brokerage services include the execution of securities transactions, custody, research, and access to mutual funds and other investments that are otherwise generally available only to institutional investors or would require a significantly higher minimum initial investment.

For our Client accounts maintained in its custody, Schwab generally does not charge separately for custody services but is compensated by account holders through commissions and other transaction-related or asset-based fees for securities trades that are executed through Schwab or that settle into Schwab accounts. Charles Schwab & Co. also makes available to OWM other products and services that benefit OWM but may not directly benefit our Clients' accounts. Many of these products and services may be used to service all or some substantial number of our Client accounts, including accounts not maintained at Schwab.

Schwab's products and services that assist OWM in managing and administering our Clients' accounts include software and other technology that: (1) provide access to Client account data (such as trade confirmations and account statements); (2) facilitate trade execution and allocate aggregated trade orders for multiple Client accounts; (3) provide research, pricing and other market data; (4) facilitate payment of our fees from Clients' accounts; and (5) assist with back-office functions, recordkeeping and Client reporting.

Charles Schwab & Co. also offers other services intended to help us manage and further develop our business enterprise. These services may include: (1) compliance, legal and business consulting; (2) publications and conferences on practice management and business succession; and (3) access to employee benefits providers, human capital consultants and insurance providers.

Schwab may make available, arrange and/or pay third-party vendors for the types of services rendered to OWM. Charles Schwab & Co. may discount or waive fees it would otherwise charge for some of these services or pay all or a part of the fees of a third-party providing these services to our firm. Charles Schwab & Co. may also provide other benefits such as educational events or occasional business entertainment for our personnel. In evaluating whether to recommend or require that Clients custody their assets at Schwab, we may consider the availability of some of the foregoing products and services and other arrangements as part of the total mix of factors we consider and not solely on the nature, cost or quality of custody and brokerage services provided by Schwab, which may create a potential conflict of interest.

OWM reserves the right to decline acceptance of any Client account for which the Client directs the use of a broker other than Schwab if we believe that this choice would hinder our fiduciary duty to the Client and/or our ability to service the account. In directing the use of Schwab (or any other broker), it should be understood that OWM will not have authority to negotiate commissions or to necessarily obtain volume discounts, and best execution may not be achieved. In addition, a disparity in commission charges may exist between the commissions charged to the Client and those charged to other Clients (who may direct the use of another broker other than Schwab). Clients should note that, while OWM has a reasonable belief that Schwab is able to obtain best execution and competitive prices, our firm will not independently seek best execution price capability through other brokers.

Directed Brokerage – It would be highly unlikely that a Client would direct OWM to use a certain broker-dealer, but in that case OWM still has a fiduciary duty to its Clients. If that occurred, OWM would be unable to negotiate commissions, obtain volume discounts, and it may be a disparity in commission charges among Clients and conflicts of interest arising from brokerage firm referrals. The firm may be unable to achieve most favorable execution of Client transactions, and this practice may cost Clients more money.

Brokerage for Client Referrals - OWM does not receive client referrals from any custodian in exchange for using that broker-dealer.

Best Execution - Investment advisors who manage or supervise Client portfolios have a fiduciary obligation of best execution. The determination of what may constitute best execution and price in the execution of a securities transaction by a broker involves several considerations and is subjective. OWM does not receive any portion of the trading fees and believes that Schwab provides an appropriate custodian solution for Clients.

Soft Dollar Arrangements - The Securities and Exchange Commission defines soft dollar practices as arrangement under which products or services other than execution services are obtained by OWM from or through a broker-dealer in exchange for directing Client transactions to the broker-dealer. As permitted by Section 28(e) of the Securities Exchange Act of 1934, OWM receives economic benefits as a result of commissions generated from securities transactions by the broker-dealer from the accounts of OWM. These benefits include both proprietary research from the broker and other research written by third parties.

A conflict of interest exists when OWM receives soft dollars. This conflict is mitigated by the fact that OWM has a fiduciary responsibility to act in the best interest of its Clients and the services received are beneficial to all Clients.

OWM utilizes the services of custodial broker dealers. Economic benefits are received by OWM which would not be received if OWM did not give investment advice to Clients. These benefits include: A dedicated trading desk, a dedicated service group and an account services manager dedicated to OWM's accounts, ability to conduct "block" Client trades, electronic download of trades, balances and positions, duplicate and batched Client statements, and the ability to have advisory fees directly deducted from Client accounts.

OWM is authorized in its discretion to aggregate purchases and sales and other transactions made for the account with purchases and sales and transactions in the same securities for other Clients of OWM. All Clients participating in the aggregated order shall receive an average share price with all other transaction costs shared on a pro-rated basis.

Item 13 - Review of Accounts

Accounts are reviewed by our Chief Compliance Officer or their designee. The frequency of reviews is determined based on the Client's investment objectives and are generally reviewed quarterly, but in any event, no less than annually.

More frequent reviews may be triggered by a change in Client's investment objectives; tax considerations; large deposits or withdrawals; large sales or purchases; loss of confidence in corporate management; or changes in the economic climate.

Investment advisory Clients receive standard account statements from the custodian of their accounts typically monthly. OWM may also provide Clients with a written report summarizing their accounts. There may be a difference between the report provided by OWM and the statement from the Custodian based on settlement versus trade date accounting, dividends, or accrued interest. It is important that Clients rely on the value as provided by the Custodian for the actual value of their accounts.

Item 14 - Client Referrals and Other Compensation

OWM may enter into agreements with individuals and organizations, which may be affiliated or unaffiliated with OWM, that refer Clients to OWM in exchange for compensation. All such agreements will be in writing and comply with the requirements of Federal or State regulation. If a Client is introduced to OWM by a solicitor, OWM may pay that solicitor a fee. While the specific terms of each agreement may differ, generally, the compensation will be based upon OWM's engagement of new Clients and is calculated using a varying percentage of the fees paid to OWM by such Clients. Any such fee shall be paid solely from OWM's investment management fee and shall not result in any additional charge to the Client.

Each prospective Client who is referred to OWM under such an arrangement will receive a copy of this brochure and a separate written disclosure document disclosing the nature of the relationship between the solicitor and OWM and the amount of compensation that will be paid by OWM to the solicitor. The solicitor is required to obtain the Client's signature acknowledging receipt of OWM's disclosure brochure and the solicitor's written disclosure statement.

We receive an economic benefit from Schwab in the form of the support products and services it makes available to us and other independent investment advisors whose clients maintain their accounts at Schwab. These products and services, how they benefit us, and the related conflicts of interest are described above, See Item 12. The availability to us of Schwab's products and services is not based on us giving particular investment advice, such as buying particular securities for our clients.

Item 15 - Custody

As noted in the Advisory Agreement signed by the Client, we do have the ability to deduct our advisory fee directly from Client accounts. Additionally, we are reporting custody on certain accounts where the client has requested the ability to electronically transfer assets to a third-party through a standing limited power of attorney (known as a SLOA). Although, we do not have any relationship, affiliation or share an address with any of the third parties, we are following SEC guidelines to report having custody of these assets. Other than these situations, we do not have custody of any client Assets.

Item 16 - Investment Discretion

Clients grant us discretion through a limited power of attorney to select, purchase, or sell securities without obtaining client specific consent within client accounts. Our Advisory Agreement will provide us with discretion authority to trade accounts. If discretion is not authorized, Client assets will be managed on a non-discretionary basis.

Item 17 - Voting Client Securities

We will not vote proxies for securities held in client accounts.

Item 18 - Financial Information

We are not aware of any circumstance that is reasonably likely to impair our ability to meet contractual commitments to clients. We do not require pre-payment of Advisory Fees in excess of \$1,200 and more than six months in advance.



Olde Wealth Management, LLC

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FIRM BROCHURE SUPPLEMENT (ADV Part 2B)

Denton Olde, CFP®

March 19, 2024

This Brochure supplement provides information about Denton Olde, CFP® (CRD #2172847) that supplements the Brochure from Olde Wealth Management, LLC. Client should have received a copy of that Brochure. Please contact us at 425-658-0821 or micah@oldewealth.com to receive the Advisor's Brochure or for any questions about the contents of this supplement.

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

Item 2 - Educational Background and Business Experience

Denton Olde, born 1971, received his Bachelor of Science in Business Management in 1992 from the University of Colorado. In 2009 he earned his Certified Financial Planner (“CFP®”) designation and his Master of Science in Personal Financial Planning from the College for Financial Planning in 2011.

He started working in the financial services industry in 1991 and started and registered with Olde Wealth Management, LLC as an investment advisor representative in June of 2020. He was a registered representative and investment advisor representative of Cetera Advisor Networks, LLC from 2014 to 2021. He has been an insurance agent as a sole proprietor since 2002. He was an investment advisor representative with Charles Schwab & Company from 2013 through 2014. From 2012 through 2014 he was a Branch Manager and registered representative with Charles Schwab & Company. From 2000 through 2012 he was a registered representative with Fidelity Brokerage Services, LLC.

The CFP® designation identifies individuals who have completed the mandatory examination, education, experience, and ethics requirements mandated by the CFP® Board. Candidates must have at least three years of qualifying work experience. CFP® candidates must pass an examination that covers over 100 financial planning topics, which broadly include: investment, financial, retirement, estate and insurance planning, risk management, employee benefits planning, income tax planning. The designation has ongoing ethics requirements and oversight by the CFP® Board and 30 hours every two years of continuing education.

Item 3 - Disciplinary Information

Denton Olde is required to disclose all material facts regarding any legal or disciplinary event that would be material to your evaluation of Olde Wealth Management, LLC or the integrity of our management. There are no material facts to disclose for Denton Olde.

Item 4 - Other Business Activities

Denton Olde has no other business activities.

Item 5 - Additional Compensation

Denton Olde receives no other compensation except as noted in ADV Part 2A – Item 4.

Item 6 - Supervision

Micah Brooks is the Chief Compliance Officer of Olde Wealth Management, LLC and supervises the firm in the areas of client services and advice, investment policies, forms and procedures, day to day operations, general management of the firm and compliance related matters.



Olde Wealth Management, LLC

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FIRM BROCHURE SUPPLEMENT (ADV Part 2B)

Micah Brooks

March 19, 2024

This Brochure supplement provides information about Micah Brooks (CRD #4519363) that supplements the Brochure from Olde Wealth Management, LLC. Client should have received a copy of that Brochure. Please contact us at 425-658-0821 or micah@oldewealth.com to receive the Advisor's Brochure or for any questions about the contents of this supplement.

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

Item 2 - Educational Background and Business Experience

Micah Brooks, born 1975, obtained his Bachelor of Science in Economics from the University of Utah in 2002. In 2020 he started Olde Wealth Management, LLC where he is an investment advisor representative and Chief Compliance Officer. He was Manager of Purple Pines, LLC from 2018 through 2020; and Manager of PlentyofTrades, LLC from 2013 through 2021. He has been President of MBRO, Inc. since 2001. He was Manager of Your Trading Recipes, LLC from 2017 to 2020.

Item 3 - Disciplinary Information

In 2006 Micah Brooks, under advice from counsel, opened a private investment firm to provide investment services. Following an audit, the state of Utah indicated that he had to be an investment advisor representative to provide the services he was offering. Micah Brooks complied with all requirements of the state, including the payment of a fine and registration as an investment advisor representative. There are no other disciplinary items to report for Micah Brooks.

Item 4 - Other Business Activities

Micah Brooks is the President of MBRO, Inc. a Utah based corporation that is involved in construction lending and part owner of Brooklyn Blush, LLC – a clothing company. Micah Brooks spends less than 10% of his time on MBRO, Inc.

Item 5 - Additional Compensation

Micah Brooks receives no other compensation except as noted in ADV Part 2A – Item 4.

Item 6 - Supervision

Micah Brooks is the Chief Compliance Officer of Olde Wealth Management, LLC and supervises the firm in the areas of client services and advice, investment policies, forms and procedures, day to day operations, general management of the firm and compliance related matters.