

*This brochure supplement provides information about Heather Morgan-Wildonger Sontag that supplements the Carlsbad Wealth Advisory Group, Inc. brochure. You should have received a copy of that brochure. Please contact Heather Morgan-Wildonger Sontag, if you did not receive Carlsbad Wealth Advisory Group, Inc.'s brochure or if you have any questions about the contents of this supplement.*

*Additional information about Heather Morgan-Wildonger Sontag is also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).*

**Carlsbad Wealth Advisory Group, Inc.**  
Form ADV Part 2B – Individual Disclosure Brochure

*for*

**Heather Morgan-Wildonger Sontag**  
Investment Adviser Representative

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## **Item 2: Educational Background and Business Experience**

**Name:** Heather Morgan-Wildonger Sontag

**Born:** 1989

### **Education Background and Professional Designations:**

#### **Education:**

Bachelor of Science in Business Administration  
Option: Accountancy  
California State University San Marcos – 2013

#### **Business Background:**

2020 – Present	Financial Planner Carlsbad Wealth Advisory Group, Inc.
2016 – Present	Accountant Solar Turbines Incorporated
2012 – 2016	Managerial Accountant TGG Accounting

## **Item 3: Disciplinary Information**

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

## **Item 4: Other Business Activities**

Heather Morgan-Wildonger Sontag is not engaged in any investment-related business or occupation (other than this advisory firm). However, Heather is currently employed by Solar Turbines, Inc. as a managerial accountant. Heather's work with Carlsbad Wealth Advisory Group (CWAG) and Solar Turbines is not related and does not overlap. Heather is considered an insider at Solar Turbines (a subsidiary of Caterpillar Inc.). Therefore, to avoid any chance of conflict she will not work with clients that own Caterpillar stock and will not provide advice regarding Caterpillar stock.

## **Item 5: Additional Compensation**

Other than direct compensation from CWAG, Heather does not receive any economic benefit from any person, company, or organization, in exchange for providing clients advisory services.

### **Item 6: Supervision**

As a Financial Planner with CWAG, Heather works closely with David Larkin George and Andrew Phillip Sontag, and all advice provided to clients is reviewed by either person prior to implementation. Heather's contact information is on the cover page of this disclosure document.