

## **Form ADV Part 2B – Brochure Supplement**

**for**

**William R. Bequette, AIF®  
Group Benefits Consultant**

**Effective: January 1, 2025**

This Form ADV 2B (“Brochure Supplement”) provides information about the background and qualifications of William R. Bequette, AIF®, (CRD# 1523918) in addition to the information contained in the AdamsBrown Wealth Consultants LLC (“AdamsBrown” or the “Advisor”, CRD# 308410) Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of the AdamsBrown Disclosure Brochure or this Brochure Supplement, please contact us at (620) 792-2428.

Additional information about Mr. Bequette is available on the SEC’s Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching with his full name or his Individual CRD# 1523918.

## Item 2 – Educational Background and Business Experience

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William R. Bequette, AIF<sup>®</sup>, born in 1961, is dedicated to advising Clients of AdamsBrown as a Group Benefits Consultant. Mr. Bequette also earned a B.A from Kansas State in 1986. Additional information regarding Mr. Bequette's employment history is included below.

### Employment History:

Group Benefits Consultant, AdamsBrown Wealth Consultants LLC	12/2023 to Present
Senior Advisor, Intrust Financial Services, Inc.	05/1999 to 10/2023
Senior Advisor, Intrust Bank	02/1999 to 10/2023
Registered Representative, LPL Financial LLC	07/2011 to 05/2018

### Accredited Investment Fiduciary™ (“AIF<sup>®</sup>”)

The AIF<sup>®</sup> mark is held by the Center for Fiduciary Studies, LLC, a Fiduciary360 (fi360) company. The professional designations awarded by fi360 demonstrate the focus on all the components of a comprehensive investment process, related fiduciary standards of care, and commitment to excellence. AIF<sup>®</sup> designees undergo an initial training program, annual continuing education, and pledge to abide by the designation's code of ethics.

Since October 2002, the Accredited Investment Fiduciary™ (AIF<sup>®</sup>) designation has been the mark of commitment to a standard of fiduciary investment excellence. Those who earn the AIF<sup>®</sup> mark successfully complete a specialized program on investment fiduciary standards of care and subsequently passed a comprehensive examination. AIF<sup>®</sup> designees demonstrate a thorough understanding of fi360's Prudent Practices for investment advisors and stewards.

## Item 3 – Disciplinary Information

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**There are no legal, civil or disciplinary events to disclose regarding Mr. Bequette.** Mr. Bequette has never been involved in any regulatory, civil or criminal action. There have been no client complaints, lawsuits, arbitration claims or administrative proceedings against Mr. Bequette.

Securities laws require an advisor to disclose any instances where the advisor or its advisory persons have been found liable in a legal, regulatory, civil or arbitration matter that alleges violation of securities and other statutes; fraud; false statements or omissions; theft, embezzlement or wrongful taking of property; bribery, forgery, counterfeiting, or extortion; and/or dishonest, unfair or unethical practices. **As previously noted, there are no legal, civil or disciplinary events to disclose regarding Mr. Bequette.**

However, we do encourage you to independently view the background of Mr. Bequette on the Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching with his full name or his Individual CRD# 1523918.

## Item 4 – Other Business Activities

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Mr. Bequette is dedicated to the investment advisory activities of AdamsBrown's Clients. Mr. Bequette does not have any other business activities.

## Item 5 – Additional Compensation

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Mr. Bequette is dedicated to the investment advisory activities of AdamsBrown's Clients. Mr. Bequette does not receive any additional forms of compensation.

## Item 6 – Supervision

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Mr. Bequette serves as Group Benefits Consultant of AdamsBrown and is supervised by Brenda Bickle, the Chief Compliance Officer. Mrs. Bickle can be reached at (620) 792-2428.

AdamsBrown Wealth Consultants LLC  
358 N Main Street, Suite 100, Wichita, KS 67202  
Phone: (620) 792-2428 \* Fax: (620) 792-5559  
<http://www.adamsbrownwc.com>

AdamsBrown has implemented a Code of Ethics, an internal compliance document that guides each Supervised Person in meeting their fiduciary obligations to Clients of AdamsBrown. Further, AdamsBrown is subject to regulatory oversight by various agencies. These agencies require registration by AdamsBrown and its Supervised Persons. As a registered entity, AdamsBrown is subject to examinations by regulators, which may be announced or unannounced. AdamsBrown is required to periodically update the information provided to these agencies and to provide various reports regarding the business activities and assets of the Advisor.

**Form ADV Part 2B – Brochure Supplement**  
**for**

**Billy I. Muhizi**  
**Associate Wealth Consultant**

**Effective: February 18, 2022**

This Form ADV 2B (“Brochure Supplement”) provides information about the background and qualifications of Billy I. Muhizi (CRD# 7305990) in addition to the information contained in the AdamsBrown Wealth Consultants, LLC (“AdamsBrown” or the “Advisor,” CRD# 308410) Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of the AdamsBrown Disclosure Brochure or this Brochure Supplement, please contact the Advisor at (620) 792-2428.

Additional information about Mr. Muhizi is available on the SEC’s Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching with his full name or individual CRD# 7305990.

## Item 2 – Educational Background and Business Experience

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Billy I. Muhizi, born in 1998, Mr. Muhizi is dedicated to advising Clients of AdamsBrown as an Associate Wealth Consultant. Mr. Muhizi earned a Bachelor of Science degree in Finance and Accounting from McPherson College in 2020. Additional information regarding Mr. Muhizi's employment history is included below.

### Employment History:

Associate Wealth Consultant, AdamsBrown Wealth Consultants, LLC	09/2020 to Present
Student, McPherson College	09/2016 to 05/2020

## Item 3 – Disciplinary Information

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**There are no legal, civil, or disciplinary events to disclose regarding Mr. Muhizi.** Mr. Muhizi has never been involved in any regulatory, civil, or criminal action. There have been no client complaints, lawsuits, arbitration claims, or administrative proceedings against Mr. Muhizi.

Securities laws require an advisor to disclose any instances where the advisor or its advisory persons have been found liable in a legal, regulatory, civil, or arbitration matter that alleges violation of securities and other statutes; fraud; false statements or omissions; theft, embezzlement, or wrongful taking of property; bribery, forgery, counterfeiting, or extortion; and/or dishonest, unfair, or unethical practices. **As previously noted, there are no legal, civil, or disciplinary events to disclose regarding Mr. Muhizi.**

However, the Advisor encourages you to independently view the background of Mr. Muhizi on the Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching with his full name or individual CRD# 7305990.

## Item 4 – Other Business Activities

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### Broker-Dealer Affiliation

Mr. Muhizi is also a registered representative of Private Client Services, LLC ("PCS"). PCS is a registered broker-dealer (CRD# 120222), member FINRA, SIPC. In Mr. Muhizi's separate capacity as a registered representative, Mr. Muhizi will receive commissions for the implementation of recommendations for commissionable transactions. Clients are not obligated to implement any recommendation provided by Mr. Muhizi. Neither the Advisor nor Mr. Muhizi will earn ongoing investment advisory fees in connection with any products or services implemented in Mr. Muhizi's separate capacity as a registered representative.

## Item 5 – Additional Compensation

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Mr. Muhizi has additional business activities where compensation is received that are detailed in Item 4 above.

## Item 6 – Supervision

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Mr. Muhizi serves as an Associate Wealth Consultant of AdamsBrown and is supervised by Brenda Bickle, the Chief Compliance Officer. Ms. Bickle can be reached at (785) 628-3046.

AdamsBrown has implemented a Code of Ethics, an internal compliance document that guides each Supervised Person in meeting their fiduciary obligations to Clients of AdamsBrown. Further, AdamsBrown is subject to regulatory oversight by various agencies. These agencies require registration by AdamsBrown and its Supervised Persons. As a registered entity, AdamsBrown is subject to examinations by regulators, which may be announced or unannounced. AdamsBrown is required to periodically update the information provided to these agencies and to provide various reports regarding the business activities and assets of the Advisor.

**Form ADV Part 2B – Brochure Supplement**  
**for**

**Brian C. Staats**  
**Principal & Wealth Consultant**

**Effective: March 27, 2024**

This Form ADV 2B (“Brochure Supplement”) provides information about the background and qualifications of Brian C. Staats (CRD# 4413351) in addition to the information contained in the AdamsBrown Wealth Consultants, LLC (“AdamsBrown” or the “Advisor,” CRD# 308410) Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of the AdamsBrown Disclosure Brochure or this Brochure Supplement, please contact the Advisor at (620) 792-2428.

Additional information about Mr. Staats is available on the SEC’s Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching with his full name or individual CRD# 4413351.

## Item 2 – Educational Background and Business Experience

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Brian C. Staats, born in 1962, is dedicated to advising Clients of AdamsBrown as a Principal and Wealth Consultant. Mr. Staats earned a Bachelor of Arts degree in Business Administration from Fort Hays State University in 1987. Mr. Staats also earned an Associate Degree of Science from Garden City Community College in 1983. Additional information regarding Mr. Staats's employment history is included below.

### Employment History:

Principal & Wealth Consultant, AdamsBrown Wealth Consultants, LLC	01/2020 to Present
Partner, Accountant, Adams Brown, LLC	01/1988 to Present
Investment Advisor Representative, Avantax Advisory Services, Inc.	04/2017 to 06/2020
Registered Representative, Avantax Investment Services, Inc.	04/2001 to 06/2020

## Item 3 – Disciplinary Information

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**There are no legal, civil, or disciplinary events to disclose regarding Mr. Staats.** Mr. Staats has never been involved in any regulatory, civil, or criminal action. There have been no client complaints, lawsuits, arbitration claims, or administrative proceedings against Mr. Staats.

Securities laws require an advisor to disclose any instances where the advisor or its advisory persons have been found liable in a legal, regulatory, civil, or arbitration matter that alleges violation of securities and other statutes; fraud; false statements or omissions; theft, embezzlement, or wrongful taking of property; bribery, forgery, counterfeiting, or extortion; and/or dishonest, unfair, or unethical practices. **As previously noted, there are no legal, civil, or disciplinary events to disclose regarding Mr. Staats.**

However, the Advisor encourages you to independently view the background of Mr. Staats on the Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching with his full name or individual CRD# 4413351.

## Item 4 – Other Business Activities

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### Broker-Dealer Affiliation

Mr. Staats is also a registered representative of Private Client Services, LLC ("PCS"). PCS is a registered broker-dealer (CRD# 120222), member FINRA, SIPC. In Mr. Staats's separate capacity as a registered representative, Mr. Staats will receive commissions for the implementation of recommendations for commissionable transactions. Clients are not obligated to implement any recommendation provided by Mr. Staats. Neither the Advisor nor Mr. Staats will earn ongoing investment advisory fees in connection with any products or services implemented in Mr. Staats's separate capacity as a registered representative.

### Insurance Agency Affiliations

Mr. Staats is also a licensed insurance professional. Implementations of insurance recommendations are separate and apart from Mr. Staats's role with AdamsBrown. As an insurance professional, Mr. Staats will receive customary commissions and other related revenues from the various insurance companies whose products are sold. Mr. Staats is not required to offer the products of any particular insurance company. Commissions generated by insurance sales do not offset regular advisory fees. This may cause a conflict of interest in recommending certain products of the insurance companies. Clients are under no obligation to implement any recommendations made by Mr. Staats or the Advisor.

### Adams Brown, LLC

Mr. Staats also serves as a Partner and Accountant of Adams Brown, LLC, a public accounting entity under common control and ownership with the Advisor. Mr. Staats may also refer Clients to utilize the services of Adams Brown, LLC. Clients are advised that these services are separate and distinct from the advisory services offered by AdamsBrown and that the receipt of additional compensation by Mr. Staats poses a conflict of interest. Clients are not obligated to engage Adams Brown, LLC. for accounting services in order to maintain a relationship with the Advisor.

AdamsBrown Wealth Consultants, LLC  
358 N Main St, Suite 100, Wichita, KS 67202  
Phone: (620) 792-2428 | Fax: (620) 663-6745  
[www.adamsbrownwc.com](http://www.adamsbrownwc.com)

## **Item 5 – Additional Compensation**

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Mr. Staats has additional business activities where compensation is received that are detailed in Item 4 above.

## **Item 6 – Supervision**

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Mr. Staats serves as a Principal and Wealth Consultant of AdamsBrown and is supervised by Brenda Bickle, the Chief Compliance Officer. Ms. Bickle can be reached at (785) 628-3046.

AdamsBrown has implemented a Code of Ethics, an internal compliance document that guides each Supervised Person in meeting their fiduciary obligations to Clients of AdamsBrown. Further, AdamsBrown is subject to regulatory oversight by various agencies. These agencies require registration by AdamsBrown and its Supervised Persons. As a registered entity, AdamsBrown is subject to examinations by regulators, which may be announced or unannounced. AdamsBrown is required to periodically update the information provided to these agencies and to provide various reports regarding the business activities and assets of the Advisor.



**Form ADV Part 2B – Brochure Supplement**  
**for**

**Clark C. Armor**  
**Group Benefit Plan Advisor, CPFA®**

**Effective: November 21, 2024**

This Form ADV 2B (“Brochure Supplement”) provides information about the background and qualifications of Clark C. Armor, CPFA® (CRD# 6085388) in addition to the information contained in the AdamsBrown Wealth Consultants, LLC (“AdamsBrown” or the “Advisor,” CRD# 308410) Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of the AdamsBrown Disclosure Brochure or this Brochure Supplement, please contact the Advisor at (620) 792-2428.

Additional information about Mr. Armor is available on the SEC’s Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching with his full name or individual CRD# 6085388.

## Item 2 – Educational Background and Business Experience

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Clark C. Armor, CPFA®, born in 1962, is dedicated to advising Clients of AdamsBrown as a Group Benefit Plan Advisor. Mr. Armor earned a Bachelor of Business Administration degree in Economics from the University of Oklahoma in 1984. Additional information regarding Mr. Armor’s employment history is included below.

### Employment History:

Group Benefit Plan Advisor, CPFA, AdamsBrown Wealth Consultants, LLC	05/2020 to Present
Registered Representative, Private Client Services, LLC	06/2020 to 11/2024
Financial Advisor, CPFA, AGH Wealth Advisors, LLC	10/2013 to 05/2020
Financial Advisor, CPFA, LPL Financial, LLC	10/2013 to 05/2020
Financial Advisor, NYLife Securities, LLC	06/2012 to 10/2013
Owner, Emcee Investments, LLC	02/2012 to 06/2012
Owner, Armor Auto Repair, LLC	09/2009 to 02/2012

### Certified Plan Fiduciary Advisor (“CPFA®”)

The Certified Plan Fiduciary Advisor credential, offered by the National Association of Plan Advisors (NAPA), was developed by some of the nation’s leading advisors and retirement plan experts. Plan advisors who earn their CPFA® demonstrate the expertise required to act as a plan fiduciary or help plan fiduciaries manage their roles and responsibilities. The NAPA CPFA® coursework covers four key areas: (1) ERISA Fiduciary Roles and Responsibilities, (2) ERISA Fiduciary Oversight, (3) ERISA Plan Investment Management, and (4) ERISA Plan Management. To earn the CPFA® designation, candidates must pass a three (3) hour, proctored CPFA® examination. In order to maintain the credential, holders of the CPFA® credential must earn 20 continuing education credits every two (2) year cycle. Two (2) of the credits must include ethics/professionalism topics.

## Item 3 – Disciplinary Information

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Securities laws require an advisor to disclose any instances where the advisor or its advisory persons have been found liable in a legal, regulatory, civil, or arbitration matter that alleges violation of securities and other statutes; fraud; false statements or omissions; theft, embezzlement, or wrongful taking of property; bribery, forgery, counterfeiting, or extortion; and/or dishonest, unfair, or unethical practices. ***There are no legal, civil, or disciplinary events requiring disclosure regarding Mr. Armor.***

However, the Advisor encourages you to independently view the background of Mr. Armor on the Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching with his full name or individual CRD# 6085388.

## Item 4 – Other Business Activities

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### Insurance Agency Affiliations

Mr. Armor is also a licensed insurance professional. Implementations of insurance recommendations are separate and apart from Mr. Armor’s role with AdamsBrown. As an insurance professional, Mr. Armor will receive customary commissions and other related revenues from the various insurance companies whose products are sold. Mr. Armor is not required to offer the products of any particular insurance company. Commissions generated by insurance sales do not offset regular advisory fees. This practice presents a conflict of interest in recommending certain products of the insurance companies. Clients are under no obligation to implement any recommendations made by Mr. Armor or the Advisor.

## Item 5 – Additional Compensation

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Mr. Armor has additional business activities where compensation is received that are detailed in Item 4 above.

## Item 6 – Supervision

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Mr. Armor serves as a Group Benefit Plan Advisor of AdamsBrown and is supervised by Brenda Bickle, the Chief Compliance Officer. Ms. Bickle can be reached at (785) 628-3046.

AdamsBrown has implemented a Code of Ethics, an internal compliance document that guides each Supervised Person in meeting their fiduciary obligations to Clients of AdamsBrown. Further, AdamsBrown is subject to regulatory oversight by various agencies. These agencies require registration by AdamsBrown and its Supervised Persons. As a registered entity, AdamsBrown is subject to examinations by regulators, which may be announced or unannounced. AdamsBrown is required to periodically update the information provided to these agencies and to provide various reports regarding the business activities and assets of the Advisor.

**Form ADV Part 2B – Brochure Supplement**  
**for**

**Grover Musser, CFP®**  
**Wealth Consultant**

**Effective: February 18, 2022**

This Form ADV 2B (“Brochure Supplement”) provides information about the background and qualifications of Grover Musser, CFP®, (CRD# 2143969) in addition to the information contained in the AdamsBrown Wealth Consultants, LLC (“AdamsBrown” or the “Advisor,” CRD# 308410) Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of the AdamsBrown Disclosure Brochure or this Brochure Supplement, please contact the Advisor at (620) 792-2428.

Additional information about Mr. Musser is available on the SEC’s Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching with his full name or individual CRD# 2143969.

## Item 2 – Educational Background and Business Experience

Grover Musser, CFP®, born in 1968, is dedicated to advising Clients of AdamsBrown as a Wealth Consultant. Mr. Musser earned a Bachelor of Science degree in Business Administration and Management from the University of Missouri-Columbia in 1991. Additional information regarding Mr. Musser’s employment history is included below.

### Employment History:

Wealth Consultant, AdamsBrown Wealth Consultants, LLC	03/2021 to Present
Registered Representative, Private Client Services, LLC	03/2021 to Present
Registered Representative, FBL Marketing Services, LLC	08/2019 to 03/2021
Wealth Management Advisor, Farm Bureau Wealth Management, LLC	08/2019 to 03/2021
Financial Advisor, U.S. Bancorp Investments, Inc.	04/2018 to 08/2019
Registered Representative, Montage Securities, LLC	10/2016 to 02/2018
Senior Wealth Advisor, Mariner Wealth Advisors, LLC	10/2016 to 02/2018

### CERTIFIED FINANCIAL PLANNER™ (“CFP®”)

The CERTIFIED FINANCIAL PLANNER™, CFP®, and federally registered CFP® (with flame design) marks (collectively, the “CFP® marks”) are professional certification marks granted in the United States by CERTIFIED FINANCIAL PLANNER™ Board of Standards, Inc. (“CFP® Board”).

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education, (2) stringent code of conduct and standards of practice, and (3) ethical requirements that govern professional engagements with clients. Currently, more than 92,000 individuals have obtained CFP® certification in the United States.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- Education – Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board’s studies have determined as necessary for the competent and professional delivery of financial planning services and attain a Bachelor’s Degree from a regionally accredited United States college or university (or its equivalent from a foreign university). The CFP Board’s financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;
- Examination – Pass the comprehensive CFP® Certification Examination. The examination includes case studies and client scenarios designed to test one’s ability to correctly diagnose financial planning issues and apply one’s knowledge of financial planning to real-world circumstances;
- Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
- Ethics – Agree to be bound by CFP Board’s Standards of Professional Conduct, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- Continuing Education – Complete 30 hours of continuing education hours every two years, including two hours on the Code of Ethics and other parts of the Standards of Professional Conduct, to maintain competence and keep up with developments in the financial planning field; and
- Ethics – Renew an agreement to be bound by the Standards of Professional Conduct. The Standards prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to the CFP Board’s enforcement process, which could result in suspension or permanent revocation of their CFP®.

### **Item 3 – Disciplinary Information**

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***There are no legal, civil, or disciplinary events to disclose regarding Mr. Musser.*** Mr. Musser has never been involved in any regulatory, civil, or criminal action. There have been no client complaints, lawsuits, arbitration claims, or administrative proceedings against Mr. Musser.

Securities laws require an advisor to disclose any instances where the advisor or its advisory persons have been found liable in a legal, regulatory, civil, or arbitration matter that alleges violation of securities and other statutes; fraud; false statements or omissions; theft, embezzlement, or wrongful taking of property; bribery, forgery, counterfeiting, or extortion; and/or dishonest, unfair, or unethical practices. ***As previously noted, there are no legal, civil, or disciplinary events to disclose regarding Mr. Musser.***

However, the Advisor encourages you to independently view the background of Mr. Musser on the Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching with his full name or individual CRD# 2143969.

### **Item 4 – Other Business Activities**

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#### Broker-Dealer Affiliation

Mr. Musser is also a registered representative of Private Client Services, LLC (“PCS”). PCS is a registered broker-dealer (CRD# 120222), member FINRA, SIPC. In Mr. Musser’s separate capacity as a registered representative, Mr. Musser will receive commissions for the implementation of recommendations for commissionable transactions. Clients are not obligated to implement any recommendation provided by Mr. Musser. Neither the Advisor nor Mr. Musser will earn ongoing investment advisory fees in connection with any products or services implemented in Mr. Musser’s separate capacity as a registered representative. Mr. Musser spends approximately 10% of his time per month in his role as a registered representative of PCS.

#### Insurance Agency Affiliations

Mr. Musser is also a licensed insurance professional. Implementations of insurance recommendations are separate and apart from Mr. Musser’s role with AdamsBrown. As an insurance professional, Mr. Musser will receive customary commissions and other related revenues from the various insurance companies whose products are sold. Mr. Musser is not required to offer the products of any particular insurance company. Commissions generated by insurance sales do not offset regular advisory fees. This practice presents a conflict of interest in recommending certain products of the insurance companies. Clients are under no obligation to implement any recommendations made by Mr. Musser or the Advisor. Mr. Musser spends approximately 10% of his time per month in this capacity.

### **Item 5 – Additional Compensation**

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Mr. Musser has additional business activities where compensation is received that are detailed in Item 4 above.

### **Item 6 – Supervision**

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Mr. Musser serves as a Wealth Consultant of AdamsBrown and is supervised by Brenda Bickle, the Chief Compliance Officer. Ms. Bickle can be reached at (785) 628-3046.

AdamsBrown has implemented a Code of Ethics, an internal compliance document that guides each Supervised Person in meeting their fiduciary obligations to Clients of AdamsBrown. Further, AdamsBrown is subject to regulatory oversight by various agencies. These agencies require registration by AdamsBrown and its Supervised Persons. As a registered entity, AdamsBrown is subject to examinations by regulators, which may be announced or unannounced. AdamsBrown is required to periodically update the information provided to these agencies and to provide various reports regarding the business activities and assets of the Advisor.

**Form ADV Part 2B – Brochure Supplement**  
**for**

**Jeffrey A. Smith**  
**Wealth Advisor**

**Effective: February 18, 2022**

This Form ADV 2B (“Brochure Supplement”) provides information about the background and qualifications of Jeffrey A. Smith (CRD# 4836573) in addition to the information contained in the AdamsBrown Wealth Consultants, LLC (“AdamsBrown” or the “Advisor,” CRD# 308410) Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of the AdamsBrown Disclosure Brochure or this Brochure Supplement, please contact the Advisor at (620) 792-2428.

Additional information about Mr. Smith is available on the SEC’s Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching with his full name or individual CRD# 4836573.

## Item 2 – Educational Background and Business Experience

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Jeffrey A. Smith, born in 1972, is dedicated to advising Clients of AdamsBrown as a Wealth Advisor. Mr. Smith earned a dual Bachelor of Science degree in Marketing and Public Relations from Kansas State University in 1994. Additional information regarding Mr. Smith's employment history is included below.

### Employment History:

Wealth Advisor, AdamsBrown Wealth Consultants, LLC	06/2020 to Present
Registered Representative, Private Client Services, LLC	06/2020 to Present
Registered Representative/Investment Advisor Representative, LPL Financial, LLC	07/2011 to 07/2020
Wealth Advisor, Intrust Bank, Inc.	11/2006 to 06/2020

## Item 3 – Disciplinary Information

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**There are no legal, civil, or disciplinary events to disclose regarding Mr. Smith.** Mr. Smith has never been involved in any regulatory, civil, or criminal action. There have been no client complaints, lawsuits, arbitration claims, or administrative proceedings against Mr. Smith.

Securities laws require an advisor to disclose any instances where the advisor or its advisory persons have been found liable in a legal, regulatory, civil, or arbitration matter that alleges violation of securities and other statutes; fraud; false statements or omissions; theft, embezzlement, or wrongful taking of property; bribery, forgery, counterfeiting, or extortion; and/or dishonest, unfair, or unethical practices. **As previously noted, there are no legal, civil, or disciplinary events to disclose regarding Mr. Smith.**

However, the Advisor encourages you to independently view the background of Mr. Smith on the Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching with his full name or individual CRD# 4836573.

## Item 4 – Other Business Activities

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### Broker-Dealer Affiliation

Mr. Smith is also a registered representative of Private Client Services, LLC ("PCS"). PCS is a registered broker-dealer (CRD# 120222), member FINRA, SIPC. In Mr. Smith's separate capacity as a registered representative, Mr. Smith will receive commissions for the implementation of recommendations for commissionable transactions. Clients are not obligated to implement any recommendation provided by Mr. Smith. Neither the Advisor nor Mr. Smith will earn ongoing investment advisory fees in connection with any products or services implemented in Mr. Smith's separate capacity as a registered representative.

### Insurance Agency Affiliations

Mr. Smith is also a licensed insurance professional. Implementations of insurance recommendations are separate and apart from Mr. Smith's role with AdamsBrown. As an insurance professional, Mr. Smith will receive customary commissions and other related revenues from the various insurance companies whose products are sold. Mr. Smith is not required to offer the products of any particular insurance company. Commissions generated by insurance sales do not offset regular advisory fees. This practice presents a conflict of interest in recommending certain products of the insurance companies. Clients are under no obligation to implement any recommendations made by Mr. Smith or the Advisor.

## Item 5 – Additional Compensation

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Mr. Smith has additional business activities where compensation is received that are detailed in Item 4 above.



## **Item 6 – Supervision**

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Mr. Smith serves as a Wealth Advisor of AdamsBrown and is supervised by Brenda Bickle, the Chief Compliance Officer. Ms. Bickle can be reached at (785) 628-3046.

AdamsBrown has implemented a Code of Ethics, an internal compliance document that guides each Supervised Person in meeting their fiduciary obligations to Clients of AdamsBrown. Further, AdamsBrown is subject to regulatory oversight by various agencies. These agencies require registration by AdamsBrown and its Supervised Persons. As a registered entity, AdamsBrown is subject to examinations by regulators, which may be announced or unannounced. AdamsBrown is required to periodically update the information provided to these agencies and to provide various reports regarding the business activities and assets of the Advisor.

**Form ADV Part 2B – Brochure Supplement**  
**for**

**Jude A. Fox, CPA<sup>®</sup>, PFS<sup>®</sup>,  
Wealth Consultant**

**Effective: March 27, 2024**

This Form ADV 2B (“Brochure Supplement”) provides information about the background and qualifications of Jude A. Fox, CPA<sup>®</sup>, PFS<sup>®</sup> (CRD# 6722610) in addition to the information contained in the AdamsBrown Wealth Consultants, LLC (“AdamsBrown” or the “Advisor,” CRD# 308410) Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of the AdamsBrown Disclosure Brochure or this Brochure Supplement, please contact the Advisor at (620) 792-2428.

Additional information about Mr. Fox is available on the SEC’s Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching with his full name or individual CRD# 6722610.

## Item 2 – Educational Background and Business Experience

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Jude A. Fox, CPA®, PFS®, born in 1984, is dedicated to advising Clients of AdamsBrown as a Wealth Consultant. Mr. Fox also earned a Bachelor of Business Administration degree in Accounting from Fort Hays State University in 2010. Additional information regarding Mr. Fox's employment history is included below.

### Employment History:

Wealth Consultant, AdamsBrown Wealth Consultants, LLC	12/2016 to Present
Registered Representative, Private Client Services, LLC	06/2020 to Present
Accountant, Manager, Adams Brown, LLC	09/2010 to Present
Investment Advisor Representative, Avantax Advisory Services, Inc.	01/2018 to 06/2020
Registered Representative, Avantax Investment Services, Inc.	10/2016 to 06/2020

### Certified Public Accountant™ (“CPA®”)

CPAs® are licensed and regulated by their state boards of accountancy. While state laws and regulations vary, the education, experience, and testing requirements for licensure as a CPA® generally include minimum college education (typically 150 credit hours with at least a baccalaureate degree and a concentration in accounting), minimum experience levels (most states require at least one year of experience providing services that involve the use of accounting, attest, compilation, management advisory, financial advisory, tax or consulting skills, all of which must be achieved under the supervision of or verification by a CPA®), and successful passage of the Uniform CPA® Examination. In order to maintain a CPA® license, states generally require the completion of 40 hours of continuing professional education (CPE®) each year (or 80 hours over a two-year period or 120 hours over a three-year period). Additionally, all American Institute of Certified Public Accountants™ (AICPA®) members are required to follow a rigorous Code of Professional Conduct, which requires that they act with integrity, objectivity, due care, and competence, fully disclose any conflicts of interest (and obtain client consent if a conflict exists), maintain client confidentiality, disclose to the client any commission or referral fees, and serve the public interest when providing financial services. The vast majority of state boards of accountancy have adopted the AICPA's® Code of Professional Conduct within their state accountancy laws or have created their own.

### Personal Financial Specialist™ (“PFS®”)

The PFS® credential demonstrates that an individual has met the minimum education, experience and testing required of a CPA® in addition to a minimum level of expertise in personal financial planning. To attain the PFS® credential, a candidate must hold an unrevoked CPA® license, fulfill 3,000 hours of personal financial planning business experience, complete 80 hours of personal financial planning CPE® credits, pass a comprehensive financial planning exam and be an active member of the AICPA®. A PFS® credential holder is required to adhere to AICPA's® Code of Professional Conduct, and is encouraged to follow AICPA's® Statement on Responsibilities in Financial Planning Practice. To maintain their PFS® credential, the recipient must complete 60 hours of financial planning CPE® credits every three years. The PFS® credential is administered through the AICPA®.

## Item 3 – Disciplinary Information

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**There are no legal, civil, or disciplinary events to disclose regarding Mr. Fox.** Mr. Fox has never been involved in any regulatory, civil, or criminal action. There have been no client complaints, lawsuits, arbitration claims, or administrative proceedings against Mr. Fox.

Securities laws require an advisor to disclose any instances where the advisor or its advisory persons have been found liable in a legal, regulatory, civil, or arbitration matter that alleges violation of securities and other statutes; fraud; false statements or omissions; theft, embezzlement, or wrongful taking of property; bribery, forgery, counterfeiting, or extortion; and/or dishonest, unfair, or unethical practices. **As previously noted, there are no legal, civil, or disciplinary events to disclose regarding Mr. Fox.**

However, the Advisor encourages you to independently view the background of Mr. Fox on the Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching with his full name or individual CRD# 6722610.

AdamsBrown Wealth Consultants, LLC  
358 N Main St, Suite 100, Wichita, KS 67202  
Phone: (620) 792-2428 | Fax: (620) 663-6745  
[www.adamsbrownwc.com](http://www.adamsbrownwc.com)

## **Item 4 – Other Business Activities**

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### Broker-Dealer Affiliation

Mr. Fox is also a registered representative of Private Client Services, LLC (“PCS”), a registered broker-dealer (CRD# 120222), member FINRA, SIPC. In Mr. Fox’s separate capacity as a registered representative, Mr. Fox will receive commissions for the implementation of recommendations for commissionable transactions. Clients are not obligated to implement any recommendation provided by Mr. Fox. Neither the Advisor nor Mr. Fox will earn ongoing investment advisory fees in connection with any products or services implemented in Mr. Fox’s separate capacity as a registered representative.

### Insurance Agency Affiliations

Mr. Fox is also a licensed insurance professional. Implementations of insurance recommendations are separate and apart from Mr. Fox’s role with AdamsBrown. As an insurance professional, Mr. Fox will receive customary commissions and other related revenues from the various insurance companies whose products are sold. Mr. Fox is not required to offer the products of any particular insurance company. Commissions generated by insurance sales do not offset regular advisory fees. This practice presents a conflict of interest in recommending certain products of the insurance companies. Clients are under no obligation to implement any recommendations made by Mr. Fox or the Advisor.

### Adams Brown, LLC

Mr. Fox also serves as a manager of Adams Brown, LLC, a public accounting under common control and ownership with the Advisor. Mr. Fox may also refer Clients to utilize the services of Adams Brown, LLC. Clients are advised that these services are separate and distinct from the advisory services offered by AdamsBrown and that the receipt of additional compensation by Mr. Fox poses a conflict of interest. Clients are not obligated to engage Adams Brown, LLC, for accounting services in order to maintain a relationship with the Advisor.

## **Item 5 – Additional Compensation**

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Mr. Fox has additional business activities where compensation is received that are detailed in Item 4 above.

## **Item 6 – Supervision**

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Mr. Fox serves as a Wealth Consultant of AdamsBrown and is supervised by Brenda Bickle, the Chief Compliance Officer. Ms. Bickle can be reached at (785) 628-3046.

AdamsBrown has implemented a Code of Ethics, an internal compliance document that guides each Supervised Person in meeting their fiduciary obligations to Clients of AdamsBrown. Further, AdamsBrown is subject to regulatory oversight by various agencies. These agencies require registration by AdamsBrown and its Supervised Persons. As a registered entity, AdamsBrown is subject to examinations by regulators, which may be announced or unannounced. AdamsBrown is required to periodically update the information provided to these agencies and to provide various reports regarding the business activities and assets of the Advisor.

**Form ADV Part 2B – Brochure Supplement**  
**for**

**Justin T. Mitchell, CPA<sup>®</sup>, PFS<sup>®</sup>**  
**Principal & Managing Wealth Consultant**

**Effective: March 27, 2023**

This Form ADV 2B (“Brochure Supplement”) provides information about the background and qualifications of Justin T. Mitchell, CPA, PFS<sup>®</sup> (CRD# 4408109) in addition to the information contained in the AdamsBrown Wealth Consultants, LLC (“AdamsBrown” or the “Advisor,” CRD# 308410) Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of the AdamsBrown Disclosure Brochure or this Brochure Supplement, please contact the Advisor at (620) 792-2428.

Additional information about Mr. Mitchell is available on the SEC’s Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching with his full name or individual CRD# 4408109.

## Item 2 – Educational Background and Business Experience

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Justin T. Mitchell, CPA, PFS®, born in 1976, is dedicated to advising Clients of AdamsBrown as a Principal and Managing Wealth Consultant. Mr. Mitchell earned a Master’s in Business Administration degree from Fort Hays State University in 2000. Mr. Mitchell also earned a Bachelor’s in Business Administration degree in Accounting from Fort Hays State University in 1999. Additional information regarding Mr. Mitchell’s employment history is included below.

### Employment History:

Principal & Managing Wealth Consultant, Adams Brown Wealth Consultants, LLC	01/2020 to Present
Registered Representative, Private Client Services, LLC	06/2020 to Present
CPA and Partner, Adams Brown, LLC	01/2000 to Present
Investment Advisor Representative, Avantax Advisory Services, Inc.	06/2001 to 06/2020
Registered Representative, Avantax Investment Services, Inc.	01/2008 to 06/2020

### Certified Public Accountant™ (“CPA®”)

CPAs® are licensed and regulated by their state boards of accountancy. While state laws and regulations vary, the education, experience, and testing requirements for licensure as a CPA® generally include minimum college education (typically 150 credit hours with at least a baccalaureate degree and a concentration in accounting), minimum experience levels (most states require at least one year of experience providing services that involve the use of accounting, attest, compilation, management advisory, financial advisory, tax or consulting skills, all of which must be achieved under the supervision of or verification by a CPA®), and successful passage of the Uniform CPA® Examination. In order to maintain a CPA® license, states generally require the completion of 40 hours of continuing professional education (CPE®) each year (or 80 hours over a two-year period or 120 hours over a three-year period). Additionally, all American Institute of Certified Public Accountants™ (AICPA®) members are required to follow a rigorous Code of Professional Conduct, which requires that they act with integrity, objectivity, due care, and competence, fully disclose any conflicts of interest (and obtain client consent if a conflict exists), maintain client confidentiality, disclose to the client any commission or referral fees, and serve the public interest when providing financial services. The vast majority of state boards of accountancy have adopted the AICPA’s® Code of Professional Conduct within their state accountancy laws or have created their own.

### Personal Financial Specialist™ (“PFS®”)

The PFS® credential demonstrates that an individual has met the minimum education, experience and testing required of a CPA® in addition to a minimum level of expertise in personal financial planning. To attain the PFS® credential, a candidate must hold an unrevoked CPA® license, fulfill 3,000 hours of personal financial planning business experience, complete 80 hours of personal financial planning CPE® credits, pass a comprehensive financial planning exam and be an active member of the AICPA®. A PFS® credential holder is required to adhere to AICPA’s® Code of Professional Conduct, and is encouraged to follow AICPA’s® Statement on Responsibilities in Financial Planning Practice. To maintain their PFS® credential, the recipient must complete 60 hours of financial planning CPE® credits every three years. The PFS® credential is administered through the AICPA®.

## Item 3 – Disciplinary Information

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***There are no legal, civil, or disciplinary events to disclose regarding Mr. Mitchell.*** Mr. Mitchell has never been involved in any regulatory, civil, or criminal action. There have been no client complaints, lawsuits, arbitration claims, or administrative proceedings against Mr. Mitchell.

Securities laws require an advisor to disclose any instances where the advisor or its advisory persons have been found liable in a legal, regulatory, civil, or arbitration matter that alleges violation of securities and other statutes; fraud; false statements or omissions; theft, embezzlement, or wrongful taking of property; bribery, forgery, counterfeiting, or extortion; and/or dishonest, unfair or unethical practices. ***As previously noted, there are no legal, civil, or disciplinary events to disclose regarding Mr. Mitchell.***

However, the Advisor encourages you to independently view the background of Mr. Mitchell on the Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching with his full name or individual CRD# 4408109.

#### **Item 4 – Other Business Activities**

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##### Broker-Dealer Affiliation

Mr. Mitchell is also a registered representative of Private Client Services, LLC (“PCS”), a registered broker-dealer (CRD# 120222), member FINRA, SIPC. In Mr. Mitchell’s separate capacity as a registered representative, Mr. Mitchell will receive commissions for the implementation of recommendations for commissionable transactions. Clients are not obligated to implement any recommendation provided by Mr. Mitchell. Neither the Advisor nor Mr. Mitchell will earn ongoing investment advisory fees in connection with any products or services implemented in Mr. Mitchell’s separate capacity as a registered representative.

##### Insurance Agency Affiliations

Mr. Mitchell is also a licensed insurance professional. Implementations of insurance recommendations are separate and apart from Mr. Mitchell’s role with AdamsBrown. As an insurance professional, Mr. Mitchell will receive customary commissions and other related revenues from the various insurance companies whose products are sold. Mr. Mitchell is not required to offer the products of any particular insurance company. Commissions generated by insurance sales do not offset regular advisory fees. This practice presents a conflict of interest in recommending certain products of the insurance companies. Clients are under no obligation to implement any recommendations made by Mr. Mitchell or the Advisor.

##### Adams Brown, LLC

Mr. Mitchell also serves as a partner of Adams Brown, LLC, a public accounting under common control and ownership with the Advisor. Mr. Mitchell may also refer Clients to utilize the services of Adams Brown, LLC. Clients are advised that these services are separate and distinct from the advisory services offered by AdamsBrown and that the receipt of additional compensation by Mr. Mitchell poses a conflict of interest. Clients are not obligated to engage Adams Brown, LLC for accounting services in order to maintain a relationship with the Advisor.

#### **Item 5 – Additional Compensation**

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Mr. Mitchell has additional business activities where compensation is received that are detailed in Item 4 above.

#### **Item 6 – Supervision**

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Mr. Mitchell serves as a Principal and Managing Wealth Consultant of AdamsBrown and is supervised by Brenda Bickle, the Chief Compliance Officer. Ms. Bickle can be reached at (785) 628-3046.

AdamsBrown has implemented a Code of Ethics, an internal compliance document that guides each Supervised Person in meeting their fiduciary obligations to Clients of AdamsBrown. Further, AdamsBrown is subject to regulatory oversight by various agencies. These agencies require registration by AdamsBrown and its Supervised Persons. As a registered entity, AdamsBrown is subject to examinations by regulators, which may be announced or unannounced. AdamsBrown is required to periodically update the information provided to these agencies and to provide various reports regarding the business activities and assets of the Advisor.

# **Form ADV Part 2B – Brochure Supplement**

**for**

**Quincey T. Bernard  
Wealth Consultant**

**Effective: August 23, 2024**

This Form ADV 2B (“Brochure Supplement”) provides information about the background and qualifications of Quincey T. Bernard (CRD# 7248228) in addition to the information contained in the AdamsBrown Wealth Consultants LLC (“AdamsBrown” or the “Advisor”, CRD# 308410) Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of the AdamsBrown Disclosure Brochure or this Brochure Supplement, please contact us at (316) 683-2067.

Additional information about Mr. Bernard is available on the SEC’s Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching with his full name or his Individual CRD# 7248228.



## Item 2 – Educational Background and Business Experience

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Quincey T. Bernard, born in 1998, is dedicated to advising Clients of AdamsBrown as a Wealth Consultant. Mr. Bernard earned his Bachelor of Science degree in International Business Management from the University of Nebraska-Lincoln in 2019. Additional information regarding Mr. Bernard's employment history is included below.

### Employment History:

Wealth Consultant, AdamsBrown Wealth Consultants LLC	08/2024 to Present
Investment Advisor Representative, Merrill Lynch, Pierce, Fenner & Smith Incorporated	12/2022 to 08/2024
Retail Trader, TD Ameritrade	04/2020 to 11/2021
Cultural Experience Intern, ResourcePro	05/2019 to 08/2019

## Item 3 – Disciplinary Information

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**There are no legal, civil or disciplinary events to disclose regarding Mr. Bernard.** Mr. Bernard has never been involved in any regulatory, civil or criminal action. There have been no client complaints, lawsuits, arbitration claims or administrative proceedings against Mr. Bernard.

Securities laws require an advisor to disclose any instances where the advisor or its advisory persons have been found liable in a legal, regulatory, civil or arbitration matter that alleges violation of securities and other statutes; fraud; false statements or omissions; theft, embezzlement or wrongful taking of property; bribery, forgery, counterfeiting, or extortion; and/or dishonest, unfair or unethical practices. **As previously noted, there are no legal, civil or disciplinary events to disclose regarding Mr. Bernard.**

However, we do encourage you to independently view the background of Mr. Bernard on the Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching with his full name or his Individual CRD# 7248228.

## Item 4 – Other Business Activities

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Mr. Bernard is dedicated to the investment advisory activities of AdamsBrown's Clients. Mr. Bernard does not have any other business activities.

## Item 5 – Additional Compensation

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Mr. Bernard is dedicated to the investment advisory activities of AdamsBrown's Clients. Mr. Bernard does not receive any additional forms of compensation.

## Item 6 – Supervision

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Mr. Bernard serves as a Wealth Consultant of AdamsBrown and is supervised by Brenda Bickle, the Chief Compliance Officer. Mrs. Bickle can be reached at (316) 683-2067.

AdamsBrown has implemented a Code of Ethics, an internal compliance document that guides each Supervised Person in meeting their fiduciary obligations to Clients of AdamsBrown. Further, AdamsBrown is subject to regulatory oversight by various agencies. These agencies require registration by AdamsBrown and its Supervised Persons. As a registered entity, AdamsBrown is subject to examinations by regulators, which may be announced or unannounced. AdamsBrown is required to periodically update the information provided to these agencies and to provide various reports regarding the business activities and assets of the Advisor.

**Form ADV Part 2B – Brochure Supplement**  
**for**

**Steven R. Baumrucker, CPA<sup>®</sup>, PFS<sup>®</sup>**  
**Principal & Wealth Consultant**

**Effective: March 27, 2024**

This Form ADV 2B (“Brochure Supplement”) provides information about the background and qualifications of Steven R. Baumrucker CPA<sup>®</sup>, PFS<sup>®</sup> (CRD# 4055316) in addition to the information contained in the AdamsBrown Wealth Consultants, LLC (“AdamsBrown” or the “Advisor,” CRD# 308410) Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of the AdamsBrown Disclosure Brochure or this Brochure Supplement, please contact the Advisor at (620) 792-2428.

Additional information about Mr. Baumrucker is available on the SEC’s Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching with his full name or individual CRD# 4055316.

## Item 2 – Educational Background and Business Experience

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Steven R. Baumrucker, CPA®, PFS®, born in 1951, is dedicated to advising Clients of AdamsBrown as a Principal & Wealth Consultant. Mr. Baumrucker earned a Bachelor of Science degree in Business Administration from Fort Hays State University in 1973. Additional information regarding Mr. Baumrucker's employment history is included below.

### Employment History:

Principal & Wealth Consultant, AdamsBrown Wealth Consultants, LLC	06/2020 to Present
Registered Representative, Private Client Services, LLC	06/2020 to Present
Investment Advisor Representative, Avantax Advisory Services, Inc.	09/2009 to 06/2020
Registered Representative, Avantax Investment Services, Inc.	06/2011 to 06/2020

### Certified Public Accountant™ (“CPA®”)

CPAs® are licensed and regulated by their state boards of accountancy. While state laws and regulations vary, the education, experience, and testing requirements for licensure as a CPA® generally include minimum college education (typically 150 credit hours with at least a baccalaureate degree and a concentration in accounting), minimum experience levels (most states require at least one year of experience providing services that involve the use of accounting, attest, compilation, management advisory, financial advisory, tax or consulting skills, all of which must be achieved under the supervision of or verification by a CPA®), and successful passage of the Uniform CPA® Examination. In order to maintain a CPA® license, states generally require the completion of 40 hours of continuing professional education (CPE®) each year (or 80 hours over a two-year period or 120 hours over a three-year period). Additionally, all American Institute of Certified Public Accountants™ (AICPA®) members are required to follow a rigorous Code of Professional Conduct, which requires that they act with integrity, objectivity, due care, and competence, fully disclose any conflicts of interest (and obtain client consent if a conflict exists), maintain client confidentiality, disclose to the client any commission or referral fees, and serve the public interest when providing financial services. The vast majority of state boards of accountancy have adopted the AICPA's® Code of Professional Conduct within their state accountancy laws or have created their own.

### Personal Financial Specialist™ (“PFS®”)

The PFS® credential demonstrates that an individual has met the minimum education, experience and testing required of a CPA® in addition to a minimum level of expertise in personal financial planning. To attain the PFS® credential, a candidate must hold an unrevoked CPA® license, fulfill 3,000 hours of personal financial planning business experience, complete 80 hours of personal financial planning CPE® credits, pass a comprehensive financial planning exam and be an active member of the AICPA®. A PFS® credential holder is required to adhere to AICPA's® Code of Professional Conduct, and is encouraged to follow AICPA's® Statement on Responsibilities in Financial Planning Practice. To maintain their PFS® credential, the recipient must complete 60 hours of financial planning CPE® credits every three years. The PFS® credential is administered through the AICPA®.

## Item 3 – Disciplinary Information

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Securities laws require an advisor to disclose any instances where the advisor or its advisory persons have been found liable in a legal, regulatory, or civil matter that alleges violation of securities and other statutes; fraud; false statements or omissions; theft, embezzlement, or wrongful taking of property; bribery, forgery, counterfeiting, or extortion; and/or dishonest, unfair, or unethical practices. **There are no legal or civil events requiring disclosure regarding Mr. Baumrucker.**

However, the Advisor encourages you to independently view the background of Mr. Baumrucker on the Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching with his full name or individual CRD# 4055316.

## Item 4 – Other Business Activities

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### Broker-Dealer Affiliation

Mr. Baumrucker is also a registered representative of Private Client Services, LLC (“PCS”). PCS is a registered broker-dealer (CRD# 120222), member FINRA, SIPC. In Mr. Baumrucker's separate capacity as a registered

AdamsBrown Wealth Consultants, LLC  
358 N Main St, Suite 100, Wichita, KS 67202  
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[www.adamsbrownwc.com](http://www.adamsbrownwc.com)

representative, Mr. Baumrucker will receive commissions for the implementation of recommendations for commissionable transactions. Clients are not obligated to implement any recommendation provided by Mr. Baumrucker. Neither the Advisor nor Mr. Baumrucker will earn ongoing investment advisory fees in connection with any products or services implemented in Mr. Baumrucker's separate capacity as a registered representative.

#### Insurance Agency Affiliations

Mr. Baumrucker is also a licensed insurance professional. Implementations of insurance recommendations are separate and apart from Mr. Baumrucker's role with AdamsBrown. As an insurance professional, Mr. Baumrucker will receive customary commissions and other related revenues from the various insurance companies whose products are sold. Mr. Baumrucker is not required to offer the products of any particular insurance company. Commissions generated by insurance sales do not offset regular advisory fees. This practice presents a conflict of interest in recommending certain products of the insurance companies. Clients are under no obligation to implement any recommendations made by Mr. Baumrucker or the Advisor.

#### Adams Brown, LLC

Mr. Baumrucker also services as a General Partner of Adams Brown, LLC, a public accounting under common control and ownership with the Advisor. Mr. Baumrucker may also refer Clients to utilize the services of Adams Brown, LLC. Clients are advised that these services are separate and distinct from the advisory services offered by AdamsBrown and that the receipt of additional compensation by Mr. Baumrucker poses a conflict of interest. Clients are not obligated to engage Adams Brown, LLC. for accounting services in order to maintain a relationship with the Advisor.

### **Item 5 – Additional Compensation**

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Mr. Baumrucker has additional business activities where compensation is received that are detailed in Item 4 above.

### **Item 6 – Supervision**

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Mr. Baumrucker serves as a Principal & Wealth Consultant of AdamsBrown and is supervised by Brenda Bickle, the Chief Compliance Officer. Ms. Bickle can be reached at (785) 628-3046.

AdamsBrown has implemented a Code of Ethics, an internal compliance document that guides each Supervised Person in meeting their fiduciary obligations to Clients of AdamsBrown. Further, AdamsBrown is subject to regulatory oversight by various agencies. These agencies require registration by AdamsBrown and its Supervised Persons. As a registered entity, AdamsBrown is subject to examinations by regulators, which may be announced or unannounced. AdamsBrown is required to periodically update the information provided to these agencies and to provide various reports regarding the business activities and assets of the Advisor.

# **Form ADV Part 2B – Brochure Supplement**

**for**

**Todd R. Sullivant, CRPC®  
Wealth Consultant**

**Effective: June 21, 2024**

This Form ADV 2B (“Brochure Supplement”) provides information about the background and qualifications of Todd R. Sullivant, CRPC® (CRD# 5469271) in addition to the information contained in the AdamsBrown Wealth Consultants LLC (“AdamsBrown” or the “Advisor”, CRD# 308410) Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of the AdamsBrown Disclosure Brochure or this Brochure Supplement, please contact us at (620) 792-2428.

Additional information about Mr. Sullivant is available on the SEC’s Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching with his full name or his Individual CRD# 5469271.

**AdamsBrown Wealth Consultants LLC**  
358 N Main St, Suite 100, Wichita, KS 67202  
Phone: (620) 792-2428 \* Fax: (620) 663-6745  
<http://www.adamsbrownwc.com/>

## Item 2 – Educational Background and Business Experience

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Todd R. Sullivant, born in 1978, CRPC®, is dedicated to advising Clients of AdamsBrown as a Wealth Consultant. Mr. Sullivant earned a degree from Hutchinson Community College. Additional information regarding Mr. Sullivant's employment history is included below.

### Employment History:

Wealth Consultant, AdamsBrown Wealth Consultants LLC	07/2023 to Present
Registered Representative, Private Client Services, LLC	07/2023 to Present
Insurance Agent, AGIA	12/2022 to 07/2023
Financial Advisor, Corebridge Financial / Valic Financial Advisors	04/2010 to 07/2023

### Chartered Retirement Planning Counselor™ (“CRPC®”)

Individuals who hold the CRPC® designation have completed a course of study encompassing pre-and post-retirement needs, asset management, estate planning, and the entire retirement planning process using models and techniques from real client situations. Additionally, individuals must pass an end-of-course examination that tests their ability to synthesize complex concepts and apply theoretical concepts to real-life situations. All designees have agreed to adhere to Standards of Professional Conduct and are subject to a disciplinary process. Designees renew their designation every two-years by completing 16 hours of continuing education, reaffirming adherence to the Standards of Professional Conduct, and complying with self-disclosure requirements.

## Item 3 – Disciplinary Information

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**There are no legal, civil or disciplinary events to disclose regarding Mr. Sullivant.** Mr. Sullivant has never been involved in any regulatory, civil or criminal action. There have been no client complaints, lawsuits, arbitration claims or administrative proceedings against Mr. Sullivant.

Securities laws require an advisor to disclose any instances where the advisor or its advisory persons have been found liable in a legal, regulatory, civil or arbitration matter that alleges violation of securities and other statutes; fraud; false statements or omissions; theft, embezzlement or wrongful taking of property; bribery, forgery, counterfeiting, or extortion; and/or dishonest, unfair or unethical practices. **As previously noted, there are no legal, civil or disciplinary events to disclose regarding Mr. Sullivant.**

However, we do encourage you to independently view the background of Mr. Sullivant on the Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching with his full name or his Individual CRD# 5469271.

## Item 4 – Other Business Activities

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### Broker-Dealer Affiliation

Mr. Sullivant is also a registered representative of Private Client Services, LLC (“PCS”). PCS is a registered broker-dealer (CRD# 120222), member FINRA, SIPC. In Mr. Sullivant's separate capacity as a registered representative, Mr. Sullivant will receive commissions for the implementation of recommendations for commissionable transactions. Clients are not obligated to implement any recommendation provided by Mr. Sullivant. Neither the Advisor nor Mr. Sullivant will earn ongoing investment advisory fees in connection with any products or services implemented in Mr. Sullivant's separate capacity as a registered representative.

### Insurance Agency Affiliations

Mr. Sullivant is also a licensed insurance professional. Implementations of insurance recommendations are separate and apart from Mr. Sullivant's role with AdamsBrown. As an insurance professional, Mr. Sullivant will receive customary commissions and other related revenues from the various insurance companies whose products are sold. Mr. Sullivant is not required to offer the products of any particular insurance company. Commissions generated by insurance sales do not offset regular advisory fees. This practice presents a conflict of interest in recommending certain products of the insurance companies. Clients are under no obligation to implement any recommendations made by Mr. Sullivant or the Advisor.

AdamsBrown Wealth Consultants LLC  
358 N Main St, Suite 100, Wichita, KS 67202  
Phone: (620) 792-2428 \* Fax: (620) 663-6745  
<http://www.adamsbrownwc.com/>

## **Item 5 – Additional Compensation**

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Mr. Sullivant has additional business activities where compensation is received that are detailed in Item 4 above.

## **Item 6 – Supervision**

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Mr. Sullivant serves as a Wealth Consultant of AdamsBrown and is supervised by Brenda Bickle, the Chief Compliance Officer. Mrs. Bickle can be reached at (620) 792-2428.

AdamsBrown has implemented a Code of Ethics, an internal compliance document that guides each Supervised Person in meeting their fiduciary obligations to Clients of AdamsBrown. Further, AdamsBrown is subject to regulatory oversight by various agencies. These agencies require registration by AdamsBrown and its Supervised Persons. As a registered entity, AdamsBrown is subject to examinations by regulators, which may be announced or unannounced. AdamsBrown is required to periodically update the information provided to these agencies and to provide various reports regarding the business activities and assets of the Advisor.

**Form ADV Part 2B – Brochure Supplement**  
**for**

**Trent L. Woodcock, CFP®**  
**Wealth Consultant**

**Effective: March 27, 2024**

This Form ADV 2B (“Brochure Supplement”) provides information about the background and qualifications of Trent L. Woodcock, CFP® (CRD# 6494107) in addition to the information contained in the AdamsBrown Wealth Consultants, LLC (“AdamsBrown” or the “Advisor,” CRD# 308410) Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of the AdamsBrown Disclosure Brochure or this Brochure Supplement, please contact the Advisor at (620) 792-2428.

Additional information about Mr. Woodcock is available on the SEC’s Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching with his full name or individual CRD# 6494107.



## Item 2 – Educational Background and Business Experience

Trent L. Woodcock, CFP®, born in 1978, is dedicated to advising Clients of AdamsBrown as a Wealth Consultant. Mr. Woodcock earned a Bachelor of Science degree in History/Political Science from McPherson College in 2000. Additional information regarding Mr. Woodcock's employment history is included below.

### Employment History:

Wealth Consultant, AdamsBrown Wealth Consultants, LLC	01/2020 to Present
Registered Representative, Private Client Services, LLC	06/2020 to Present
Investment Advisor Representative, Avantax Advisory Services, Inc.	08/2017 to 06/2020
Registered Representative, Avantax Investment Services, Inc.	08/2017 to 06/2020
Financial Advisor, Edward Jones, LP	06/2015 to 09/2017
Teacher, USD 262	09/2010 to 05/2015

### Certified Financial Planner™ (“CFP®”)

The Certified Financial Planner™, CFP®, and federally registered CFP® (with flame design) marks (collectively, the “CFP® marks”) are professional certification marks granted in the United States by the Certified Financial Planner™ Board of Standards, Inc. (“CFP® Board”).

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold the CFP® certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education, (2) stringent code of conduct and standards of practice, and (3) ethical requirements that govern professional engagements with clients. Currently, more than 95,000 individuals have obtained the CFP® certification in the United States.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- **Education** – Complete an advanced college-level course of study addressing the financial planning subject areas that the CFP® Board's studies have determined as necessary for the competent and professional delivery of financial planning services and attain a Bachelor's Degree from a regionally accredited United States college or university (or its equivalent from a foreign university). The CFP® Board's financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;
- **Examination** – Pass the comprehensive CFP® Certification Examination. The examination includes case studies and client scenarios designed to test one's ability to correctly diagnose financial planning issues and apply one's knowledge of financial planning to real-world circumstances;
- **Experience** – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
- **Ethics** – Agree to be bound by the CFP® Board's *Standards of Professional Conduct*, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- **Continuing Education** – Complete 30 hours of continuing education hours every two years, including two hours on the *Code of Ethics* and other parts of the *Standards of Professional Conduct*, to maintain competence and keep up with developments in the financial planning field; and
- **Ethics** – Renew an agreement to be bound by the *Standards of Professional Conduct*. The *Standards* prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to the CFP® Board's enforcement process, which could result in suspension or permanent revocation of their CFP®.

### **Item 3 – Disciplinary Information**

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***There are no legal, civil, or disciplinary events to disclose regarding Mr. Woodcock.*** Mr. Woodcock has never been involved in any regulatory, civil, or criminal action. There have been no client complaints, lawsuits, arbitration claims, or administrative proceedings against Mr. Woodcock.

Securities laws require an advisor to disclose any instances where the advisor or its advisory persons have been found liable in a legal, regulatory, civil, or arbitration matter that alleges violation of securities and other statutes; fraud; false statements or omissions; theft, embezzlement, or wrongful taking of property; bribery, forgery, counterfeiting, or extortion; and/or dishonest, unfair, or unethical practices. ***As previously noted, there are no legal, civil, or disciplinary events to disclose regarding Mr. Woodcock.***

However, the Advisor encourages you to independently view the background of Mr. Woodcock on the Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching with his full name or individual CRD# 6494107.

### **Item 4 – Other Business Activities**

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#### Broker-Dealer Affiliation

Mr. Woodcock is also a registered representative of Private Client Services, LLC (“PCS”). PCS is a registered broker-dealer (CRD# 120222), member FINRA, SIPC. In Mr. Woodcock’s separate capacity as a registered representative, Mr. Woodcock will receive commissions for the implementation of recommendations for commissionable transactions. Clients are not obligated to implement any recommendation provided by Mr. Woodcock. Neither the Advisor nor Mr. Woodcock will earn ongoing investment advisory fees in connection with any products or services implemented in Mr. Woodcock’s separate capacity as a registered representative.

#### Insurance Agency Affiliations

Mr. Woodcock is also a licensed insurance professional. Implementations of insurance recommendations are separate and apart from Mr. Woodcock’s role with AdamsBrown. As an insurance professional, Mr. Woodcock will receive customary commissions and other related revenues from the various insurance companies whose products are sold. Mr. Woodcock is not required to offer the products of any particular insurance company. Commissions generated by insurance sales do not offset regular advisory fees. This may cause a conflict of interest in recommending certain products of the insurance companies. Clients are under no obligation to implement any recommendations made by Mr. Woodcock or the Advisor.

### **Item 5 – Additional Compensation**

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Mr. Woodcock has additional business activities where compensation is received that are detailed in Item 4 above.

### **Item 6 – Supervision**

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Mr. Woodcock serves as a Wealth Consultant of AdamsBrown and is supervised by Brenda Bickle, the Chief Compliance Officer. Ms. Bickle can be reached at (785) 628-3046.

AdamsBrown has implemented a Code of Ethics, an internal compliance document that guides each Supervised Person in meeting their fiduciary obligations to Clients of AdamsBrown. Further, AdamsBrown is subject to regulatory oversight by various agencies. These agencies require registration by AdamsBrown and its Supervised Persons. As a registered entity, AdamsBrown is subject to examinations by regulators, which may be announced or unannounced. AdamsBrown is required to periodically update the information provided to these agencies and to provide various reports regarding the business activities and assets of the Advisor.