

**Form ADV Part 2B - Brochure Supplement
Item 1: Cover Page
February 2, 2024**

**Austin M. Smith, CFA®, CFP®
CRD# 6937398**

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Mansfield, Texas 76063**

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**Phone: (817) 405 - 4014
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This brochure supplement provides information about Austin Smith that supplements our brochure. You should have received a copy of that brochure. Please contact Mr. Schulz, Chief Compliance Officer if you did not receive Schulz Wealth, Ltd.'s brochure or if you have any questions about the contents of this supplement.

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

Item 2: Educational Background & Business Experience

Austin Michael Smith

Year of Birth: 1995

Educational Background:

- 2017; Southwestern University, Georgetown Texas; BA Business, Emphasis in Finance

Business Background:

- 03/2018 – Present -Schulz Wealth, Ltd; Chief Investment Officer and Investment Adviser Representative
- 02/2017 – 07/2017 TCG Adviser’s; Institutional Associate

Exams, Licenses & Professional Designations:

- 11/2022 – Certified Financial Planner™ (“CFP®”) certificant
- 07/2020 – Chartered Financial Analyst® charter holder
- 08/2018 – Series 65 Exam

CFA® - Chartered Financial Analyst®

CFA® and Chartered Financial Analyst® are registered trademarks owned by CFA Institute. The minimum qualifications for this certification are as follows:

- Bachelor’s degree (or equivalent, as assessed by CFA Institute)
- Must pass three six-hour exams
- Must have 48 months of qualified, professional work experience
- CFA® charter holders are obligated to follow the CFA’s Code of Ethics and standards governing professional conduct.

* Additional information about this certification can be found at: www.cfainstitute.org

CFP® - CERTIFIED FINANCIAL PLANNER™:

The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered 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 high standard of professional education, stringent code of conduct and standards of practice and ethical requirements that govern professional engagements with clients. To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements: 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, pass the comprehensive CFP® Certification Examination, Complete at least three years of full-time financial planning-related experience and agree to be bound by CFP Board’s *Standards of Professional Conduct*.

Individuals who become certified must 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 industry and 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.

Series 65

The examination, called the Series 65 exam, is designed to qualify candidates as an investment adviser representative. The exam covers topics that have been determined to be necessary to understand to provide investment advice to clients.

Item 3: Disciplinary Information

There are no legal or disciplinary events that are material to the evaluation of Mr. Smith.

Item 4: Other Business Activities

Mr. Smith has no other business activities outside of his role with the Firm that are investment-related, or that represent a substantial amount (i.e., more than 10%) of his time or income.

Item 5: Additional Compensation

Mr. Smith does not receive any other economic benefit for providing advisory services in addition to advisory fees.

Item 6: Supervision

Mr. Smith reports to Mr. Schulz. Mr. Schulz is the principal and Chief Compliance Officer and as such has no internal supervision placed over him. He is, however, bound by our firm's Code of Ethics. Please contact Mr. Schulz if you have any questions about this brochure supplement at (817) 405-4014.