

Form ADV Part 2B - Brochure Supplement

Item 1: Cover Page

October 18, 2023

**Jared L. Pestcoe, CFP®
CRD# 6811900**

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

Item 2: Educational Background & Business Experience

Jared Louis Pestcoe

Year of Birth: 1994

Educational Background:

2017; University of Pittsburgh; BBA Finance

Business Background:

- 05/2022 – Present -Schulz Wealth, Ltd; Operations Manager *as of 01/2023 obtained registration as an Investment Adviser Representative
- 02/2021 – 03/2022 – Dynasty Financial Partners; VP of Network Development
- 03/2019 – 02/2021 – TD Ameritrade; Sales Support Specialist
- 06/2017 – 03/2019 – The Vanguard Group, Inc.; Registered Person

Exams, Licenses & Other Professional Designations:

- 04/2023 - Certified Financial Planner™
- 01/2023 – Series 65 Exam

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 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. Pestcoe.

Item 4: Other Business Activities
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Mr. Pestcoe 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
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Mr. Pestcoe does not receive any other economic benefit for providing advisory services in addition to advisory fees.

Item 6: Supervision

Mr. Pestcoe 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.