

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

**Robert R. Schulz, CFP®
CRD# 2664834**

**Schulz Wealth, Ltd.
1752 Broad Park Circle North, Suite 110
Mansfield, Texas 76063**

**6363 State Hwy 161, Suite 225
Irving, TX 75038**

**Phone: (817) 405 - 4014
Website: <http://www.schulzwealth.com>**

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

Item 2: Educational Background & Business Experience

Robert Rankin Schulz

Year of Birth: 1967

Educational Background:

- 1990; University of Texas, Austin; BBA Accounting

Business Background:

- 09/2014 – Present Schulz Wealth, Ltd;
Investment Adviser Representative and Chief Compliance Officer
- 02/2000 – 04/2018 First Texas Financial Services Corp.; President
- 10/2006 – 09/2014 Cambridge Investment Research;
Registered Representative and Investment Adviser Representative
- 01/2003 – 10/2006 Signal Securities;
Registered Representative and Investment Adviser Representative
- 11/1995 – 12/2002 Princor Financial Services, Corp.;
Registered Representative and Investment Adviser Representative
- 05/1990 – 05/1994 United States Navy; Lieutenant (O3) Surface Warfare Officer; Aboard
USS John Rodgers (DD-983)

Exams, Licenses & Other Professional Designations:

- 10/2001 – Certified Financial Planner™
- 06/2001 – Series 24 (Inactive)
- 01/2001 – General Lines Agent: Property and Casualty (Inactive)
- 02/2000 – Series 7 (Inactive)
- 11/1995 – Series 6 and Series 63 (Inactive)
- 10/1995 – General Lines Agent: Life, Accident, Health and HMO (Inactive)

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.

Item 3: Disciplinary Information

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

Item 4: Other Business Activities

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

Item 6: Supervision

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.