



## Klein Wealth Management, LLC

503 Cloisterbane Drive, Saint Johns, FL

(904)-910-1426

### Bryan K Klein, CFP<sup>®</sup>, CEO/CCO

Principal Wealth Advisor

Investment Advisor Representative

### Noah C Strunk, CFP<sup>®</sup>

Wealth Advisor

Investment Advisor Representative

## Form ADV Part 2B

Brochure Supplement

January 1, 2026

This brochure provides information about Bryan Klein that supplements Klein Wealth Management, LLC.

Form ADV Part 2A firm brochure. You should have received a copy of that brochure. Please contact Mr. Bryan Klein at (904)-910-1426 if you did not receive Klein Wealth Management, LLC's brochure or if you have any questions about the contents of this supplement.

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

**Bryan K. Klein, CFP®, Principal Wealth Advisor**

CRD Number: 1258703

### **Educational Background**

**BOSTON UNIVERSITY**, Boston, MA, Graduated 2009

**Master of Science**, Banking and Financial Services Management

**TEXAS TECH UNIVERSITY**, Lubbock, TX, Graduated 2001

**Bachelor of Business Administration**, Finance, Accounting, Economics

### **Certifications**

**CERTIFIED FINANCIAL PLANNER**, CFP Board, Completed 2014

Requirements to pass the CFP include the following:

- Complete a CFP Board education program
- Sit for the CFP® exam
- Hold or earn a bachelor's degree from an accredited university
- Demonstrate financial planning experience (6,000 hours) in relevant personal financial planning activities
- Pass CFP Board's Candidate Fitness Standards

### **Professional Experience**

**Klein Wealth Management, LLC**- Saint Johns, FL

Chief Executive Officer/Chief Compliance Officer/Principal Wealth Advisor December 2019-Present

**SS&C Avent**- Jacksonville, FL

Product Manager – Financial Planning February 2019-Present

**Fidelity Personal and Workplace Advisors/Brokerage Services**- Jacksonville, FL

V.P. Financial Consultant-Portfolio Advisory Services, October 2010-November 2018

Senior Advisor-Portfolio Advisory Services May 2007-September 2010

Associate Defined Contribution and Pension Specialist June 2005-April 2007

**TD Ameritrade-** Dallas/Fort Worth, TX

Branch Investment Consultant

March 2002-May 2005

**American Express Financial Advisors-** Dallas/Fort Worth, TX

Financial Advisor

December 2001-February 2002

**Item 3 – Disciplinary Information**

Mr. Klein has had no disciplinary events

**Item 4 – Other Business Activities**

Mr. Klein is currently employed full time at a financial technology (Fintech) company. This employment does not have a conflict of interest as it does not involve making investment decisions or providing investment advice.

**Item 5 – Additional Compensation**

Neither KWM nor Mr. Klein is compensated for advisory services involving performance-based fees.

In addition, firm policy does not allow associated persons to accept or receive additional economic benefit, such as sales awards or other prizes, for providing advisory services to firm clients.

**Item 6 – Supervision**

Mr. Klein is the sole owner of KWM and makes all decisions, in collaboration with firm clients, with regards to financial planning and investment management and is responsible for self-supervision.

Mr. Klein is subject to the firm's compliance policies and procedures and Code of Ethics.

**Item 7 - Requirements for State Registered Advisers**

There have been neither awards nor sanctions or other matters where Mr. Klein or KWM has been found liable in an arbitration, self-regulatory or administrative proceeding.

Neither Mr. Klein nor KWM has been the subject of a bankruptcy petition.

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

**Noah C Strunk, CFP®, Wealth Advisor**

CRD Number: 4970128

### **Educational Background**

**UNIVERSITY OF NORTH FLORIDA, Jacksonville, FL** Graduated 2010

**Master of Business Administration, Finance**

**UNIVERSITY OF NORTH FLORIDA, Jacksonville, FL** Graduated 2006

**Bachelor of Business Administration, Investments**

### **Certifications**

**CERTIFIED FINANCIAL PLANNER, CFP Board,** Completed 2017

Requirements to pass the CFP include the following:

- Complete a CFP Board education program
- Sit for the CFP® exam
- Hold or earn a bachelor’s degree from an accredited university
- Demonstrate financial planning experience (6,000 hours) in relevant personal financial planning activities
- Pass CFP Board’s Candidate Fitness Standards

### **Professional Experience**

**Ward & Ward, Inc. – Atlantic Beach, FL**

Chief Financial Officer July 2023- Present

**Klein Wealth Management, LLC- Saint Johns, FL**

Senior Financial Advisor December 2019-Present

**SS&C Avent- Jacksonville, FL**

Account Executive, Advisory Sales February 2019-July 2023

**Sade Group Private Wealth Management – Stuart, FL**

Financial Planner/Advisor April 2018 – February 2019

**Fidelity Investments- Jacksonville, FL**

Portfolio Specialist	April 2015-July 2017
Investment Consultant	January 2013-March 2015
Client Management Representative	June 2011-January 2013
Retirement Relationship Manager	March 2009 – June 2011

**Item 4 – Other Business Activities**

None

**Item 5 – Additional Compensation**

Neither KWM nor Mr. Strunk is compensated for advisory services involving performance-based fees.

In addition, firm policy does not allow associated persons to accept or receive additional economic benefit, such as sales awards or other prizes, for providing advisory services to firm clients.

**Item 6 – Supervision**

Mr. Strunk assists Mr. Klein (sole owner of Klein Wealth Management) in all decisions, in collaboration with firm clients, with regards to financial planning and investment management and is responsible for self-supervision.

Mr. Strunk is subject to the firm’s compliance policies and procedures and Code of Ethics.

**Item 7 - Requirements for State Registered Advisers**

There have been neither awards nor sanctions or other matters where Mr. Strunk or KWM has been found liable in an arbitration, self-regulatory or administrative proceeding.

Neither Mr. Strunk nor KWM has been the subject of a bankruptcy petition.