Angela Frazier, CPA, CGMA, CVA

EGP Wealth Management, LLC

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FORM ADV PART 2B
BROCHURE SUPPLEMENT

This brochure supplement provides information about Angela Frazier that supplements the EGP Wealth Management, LLC brochure. You should have received a copy of that brochure. Contact us at 501-320-1021 if you did not receive EGP Wealth Management, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Angela Frazier (CRD # 6262219) is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Angela Frazier, CPA, CGMA, CVA
Year of Birth: 1965
Formal Education After High School:

- Harding University; Searcy, AR; Attended 08/01/1984 - 08/01/1985
- University of Central Arkansas; Conway, AR
    - Bachelor of Business Administration in Accounting, 1988

Business Background:

- EGP Wealth Management, LLC, Investment Adviser Representative, 10/2018 - Present
- EGP Wealth Management, LLC, Managing Partner, 07/2014 - Present
- EGP Wealth Management, LLC, Chief Compliance Officer, 01/2023 - 3/2025
- EGP Wealth Management, LLC, Chief Compliance Officer, 08/2018 - 08/2019
- 1st Global Advisors Inc, Investment Adviser Representative, 09/2014 - 10/2018
- 1st Global Capital Corp, Registered Representative, 09/2014 - 10/2018
- EGP, PLLC, CPA/Partner, 01/2013 - Present
- H.D. Vest Investment Services, Registered Representative, 10/2013 - 09/2014
- EGP, PLLC, CPA/Tax Manager, 07/2007 - 12/2012
- Angela Frazier, CPA PA, CPA/Partner, 01/2007 - 06/2007
- Allen & Frazier, CPAS, PC, CPA/Partner, 09/2004 - 12/2006
- Angela Y. Frazier, PC, CPA/Partner, 08/1994 - 09/2004

Certifications: **CPA, CGMA, CVA**

Certified Public Accountant (CPA)
CPA's 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, 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.

Chartered Global Management Accountant (CGMA)
CGMA designation holders are business strategists who apply non-financial, qualitative information along with financial analysis to understand all aspects of business.The CGMA designation was created by the Association of International Certified Professional Accountants to increase the recognition of management accounting worldwide. The CGMA designation serves as complement to the U.S. CPA and helps AICPAmembers stand out as leading management accountants. To earn the CGMA designation through the AICPA, you must demonstrate mastery of the technical finance and accounting skills as well as the business acumen and strategic leadership abilities. You also need to satisfy the Practical Experience Requirements, with a minimum of three years of relevant, work-based

experience. All CGMA designation holders around the world are subject to a uniform set of ethical standards. The AICPA and CIMA bylaws require that all respective members adhere to the AICPA and CIMA codes.

Certified Valuation Analyst (CVA) - The designation of Certified Valuation Analyst (CVA) is a professional designation awarded by the National Association of Certified Valuators and Analysts (NACVA) to business valuation professionals. Candidates must hold a business degree, have sufficient work experience in business valuation, submit business and personal references and recommendations, be members in good standing of NACVA and pass the CVA exam. Every three years, CVA professionals must complete 36 hours of continuing professional education to maintain the designation.

Item 3 Disciplinary Information

Form ADV Part 2B requires disclosure of certain criminal or civil actions, administrative proceedings, and self-regulatory organization proceedings, as well as certain other proceedings related to suspension or revocation of a professional attainment, designation, or license. Ms. Angela Frazier has no required disclosures under this item.

Item 4 Other Business Activities

Angela Frazier is a Partner and certified public accountant ("CPA") with EGP, PLLC, a certified public accounting firm. Clients of our firm may also be clients of EGP, PLLC. The services provided and compensation received by Ms. Frazier and EGP, PLLC for accounting related activities are separate and distinct from any fees paid for advisory services provided by our firm.

Angela Frazier is a Partner of EGP Holdings, LLC, a commercial real estate rental company. Ms. Frazier's duties as a Partner of EGP Holdings, LLC does not create a conflict of interest to her provision of advisory services through EGP Wealth Management, LLC.

Ms. Frazier is also separately licensed as an independent insurance agent. In this capacity, she can effect transactions in insurance products for her clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by Ms. Frazier for insurance related activities. This presents a conflict of interest because Ms. Frazier may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.

Ms. Frazier serves as a volunteer finance committee member for Alzheimer’s Arkansas, an independent nonprofit organization, contributing five hours monthly outside trading hours, with no compensation derived from this role.

Item 5 Additional Compensation

Refer to the *Other Business Activities* section above for disclosures on Ms. Frazier's receipt of additional compensation as a result of her other business activities.

Also, refer to the *Fees and Compensation*, *Client Referrals and Other Compensation, and Other Financial Industry Activities and Affiliations* section(s) of EGP Wealth Management, LLC's firm brochure for additional disclosures on this topic.

Item 6 Supervision

In the supervision of our associated persons, advice provided is limited based on the restrictions set by EGP Wealth Management, LLC, and by internal decisions as to the types of investments that may be included in client portfolios. We conduct periodic reviews of client holdings and documented suitability information to provide reasonable assurance that the advice provided remains aligned with each client's stated investment objectives and with our internal guidelines.

Joe Kersey, Chief Compliance Officer, supervises the advisory activities for our firm.

Supervisor phone number: 501-320-1021

Item 7 Requirements for State Registered Advisers

Angela Frazier does not have any reportable arbitration claims, has not been found liable in a reportable civil, self-regulatory organization or administrative proceeding, and has not been the subject of a bankruptcy petition.