Joe Kersey, AAMS®, CRPC®

EGP Wealth Management, LLC

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FORM ADV PART 2B
BROCHURE SUPPLEMENT

This brochure supplement provides information about Joe Kersey 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 Joe Kersey (CRD # 6834463) is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Joe Kersey, AAMS®, CRPC®
Year of Birth: 1959
Formal Education After High School:

- University of Central Arkansas, BS Mathematics, 1979

Business Background:

- EGP Wealth Management, LLC, Director of Wealth Management, 6/2024 - Present; Chief Compliance Officer, 3/2025 - Present
- LPL Financial, LLC, Registered Representative/Investment Adviser Representative, 12/2020 - 6/2024
- Edward Jones, Registered Representative/Investment Adviser Representative, 8/2017 - 12/2020

Certifications: **AAMS®, CRPC®**

Accredited Asset Management Specialist℠ (AAMS®)
This designation is awarded by the College for Financial Planning to investment professionals who complete its 12-module AAMS® Professional Education Program, pass an examination, commit to a code of ethics and agree to pursue continuing education.

Chartered Retirement Planning Counselor (CRPC®)
Chartered Retirement Planning Counselor (CRPC®) is a professional financial planning designation awarded by the College for Financial Planning. Individuals may earn the CRPC® designation by completing a study program and passing a final multiple-choice examination. Successful applicants earn the right to use the CRPC® designation with their names for two years. Every two years, CRPC® professionals must complete 16 hours of continuing education and pay a small fee to continue using 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. Mr. Joe Kersey has no required disclosures under this item.

Item 4 Other Business Activities

Joe Kersey is separately licensed as an independent insurance agent. In this capacity, he can effect transactions in insurance products for his 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 Mr. Kersey for insurance related activities. This presents a conflict of interest because Mr. Kersey 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.

Mr. Kersey is also Managing Member of JEK Holdings, LLC, a holding company. Mr. Kersey's duties as the Managing Member of JEK Holdings, LLC do not create a conflict of interest to his provision of advisory services through EGP Wealth Management, LLC.

Item 5 Additional Compensation

Refer to the *Other Business Activities* section above for disclosures on Mr. Kersey's receipt of additional compensation as a result of his 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

Joe Kersey is the Chief Compliance Officer, and an advisory representative of EGP Wealth Management, LLC and supervises the advisory activities for our firm. Mr. Kersey is also subject to the firm's policies and procedures and code of ethics. He can be reached at 501-320-1021.

Item 7 Requirements for State Registered Advisers

Joe Kersey 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.