

## **Part 2B of Form ADV: *Brochure Supplement***

**Jason W. Ceyanes, Sr.**

**Encompass Advisory Services, LLC**

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**This brochure supplement provides information about Jason W. Ceyanes, Sr. that supplements the Encompass Advisory Services brochure. You should have received a copy of that brochure. Please contact Jason W. Ceyanes, Sr. if you did not receive an Encompass Advisory Services brochure or if you have any questions about the contents of this supplement.**

**Additional information about Jason W. Ceyanes, Sr. is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov). You can search this site by a unique identifying number, known as a CRD number. The CRD number for Jason W. Ceyanes, Sr. is 5994336.**

## Item 2. Educational Background and Business Experience

Jason W. Ceyanes, Sr.

*Year of Birth:* 1972

### *Education:*

- Texas A&M University, Ph.D. in Educational Administration
- University of Houston Clear Lake, MS in Educational Management
- University of Houston Clear Lake, BA in Biological Sciences

### *Professional Designation:*

- CERTIFIED FINANCIAL PLANNER™ professional (2017 – Present)

I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and I may use these and CFP Board’s other certification marks (the “CFP Board Certification Marks”). The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at [www.CFP.net](http://www.CFP.net).

CFP® professionals have met CFP Board’s high standards for education, examination, experience, and ethics. To become a CFP® professional, an individual must fulfill the following requirements:

- Education – Earn a bachelor’s degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials. CFP Board implemented the bachelor’s degree or higher requirement in 2007 and the financial planning development capstone course requirement in March 2012. Therefore, a CFP® professional who first became certified before those dates may not have earned a bachelor’s or higher degree or completed a financial planning development capstone course.
- Examination – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual’s ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.
- Experience – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.
- Ethics – Satisfy the *Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement* and agree to be bound by CFP Board’s *Code of Ethics and Standards of Conduct (“Code and Standards”)*, which sets forth the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements to remain certified and maintain the right to continue to use the CFP Board Certification Marks:

- Ethics – Commit to complying with CFP Board’s *Code and Standards*. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional’s services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.

- Continuing Education – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the *Code and Standards*.

*Licenses:*

- State registration IA in Texas
- State registration IA in California

*Business Background:*

- Encompass Advisory Services, LLC; 05/2019 – Present
  - o President/CEO/CFO, Partner, Investment Advisor; 01/2025-Present:
  - o President, Chief Executive Officer, Chief Financial Officer, Adviser; 03/2024 – 01/2025
  - o President, Chief Executive Officer, Chief Compliance Officer, Chief Financial Officer, Adviser; 02/2023 – 02/2024
  - o Senior Vice President, Chief Compliance Officer, Adviser; 05/2019 – 02/2023
- University of Houston Clear Lake; Adjunct Professor, 08/2018 – 05/2025
- The Leader’s Group; Registered Representative, 05/2021 – 08/2023
- MWA Financial Services Inc.; Investment Adviser Representative, 11/2017 – 05/2019
- Modern Woodman of America; Financial Representative, 10/2011 – 05/2019
- MWA Financial Services Inc.; Registered Representative, 10/2011 – 05/2019

**Item 3. Disciplinary Information**

Jason W. Ceyanes, Sr. has NOT been subject to any criminal actions, revocations, or suspensions.

**Item 4. Other Business Activities**

- INDEPENDENT INSURANCE AGENT - 5/15/2019 - 23114 Seven Meadows Pkwy, Katy, TX 77494 - Agent, Sale life insurance and LTC, Not Invt Rel, Insurance business, 5 hrs/mo; 3 hrs/mo during trading hours. Brief description of duties: Sales of annuities and life, disability and long-term care insurance.
- ENCOMPASS ADVISORY SERVICES, LLC - 5/15/2019 - 23114 Seven Meadows Pkwy, Katy, TX 77494 - President/CEO/CFO, Outside RIA, Invt Rel, RIA, 160 hrs/mo; 160 hrs/mo during trading hours.

**Item 5. Additional Compensation**

The Investment Advisor Representative (IAR), Jason W. Ceyanes, Sr., is licensed as an insurance agent and sells insurance products through Encompass Advisory Services. As an insurance agent, the IAR will receive separate, yet customary, compensation for insurance product sales. Jason W. Ceyanes, Sr. provides investment-planning advice to his customers on a fee basis. If you were to purchase a commission-based product from him, he will explain how he is paid and how it differs from a fee-based transaction. He may also receive sales awards and other prizes from his insurance business and activities.

**Item 6. Supervision**

Jason W. Ceyanes, Sr. is responsible for the supervision and monitoring of investment advice offered to advisory clients of Encompass Advisory Services. He can be reached at 281-371-6300.

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

Jason W. Ceyanes, Sr. has NOT been *involved* in any of the events listed below.

1. Has NOT had an award or otherwise being *found* liable in an arbitration claim alleging damages in excess of \$2,500, *involving* any of the following:
  - a. an investment or an *investment-related* business or activity;
  - b. fraud, false statement(s), or omissions;
  - c. theft, embezzlement, or other wrongful taking of property;
  - d. bribery, forgery, counterfeiting, or extortion; or
  - e. dishonest, unfair, or unethical practices.
2. Has NOT had an award or otherwise being *found* liable in a civil, *self-regulatory organization*, or administrative *proceeding involving* any of the following:
  - a. an investment or an *investment-related* business or activity;
  - b. fraud, false statement(s), or omissions;
  - c. theft, embezzlement, or other wrongful taking of property;
  - d. bribery, forgery, counterfeiting, or extortion; or
  - e. dishonest, unfair, or unethical practices.
3. Has NOT been the subject of a bankruptcy petition.