

CLEARPATH WEALTH MANAGEMENT

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ADV PART 2A BROCHURE 2/17/2026

This brochure provides information about the qualifications and business practices of ClearPath Wealth Management. If you have any questions about the contents of this brochure, please contact us at (913) 336-3500 or info@blwinvestments.com. The information in this brochure has not been approved or verified by the United States Securities and Exchange Commission or by any state securities authority.

Additional information about ClearPath Wealth Management also is available on the SEC's website at www.adviserinfo.sec.gov.

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ITEM 2: Material Changes

There have been no material changes since the last update of this brochure.

ITEM 2: Advisory Business

ClearPath Wealth Management (CPWM) is a Limited Liability Co., which was established on June 1st, 1998. ClearPath Wealth management is owned by ClearPath Financial Group (CPFG). The principal owners of CPFG are Keith D. Hanson, Timothy E. Lanz, Cory L. Lagerstrom, Gary Bush and Kyle P. Nagy.

Portfolio Management – CPWM provides advisory services related to managing assets, commonly called Portfolio Management. We manage client’s portfolios on a discretionary basis by monitoring client accounts and will make investment changes when necessary. On a discretionary basis means we are authorized to make decisions in the clients best interest when selecting and trading investments within accounts we are authorized to manage. These changes are made when we believe it is in the clients best interest and where the changes are consistent with our understanding of the clients investment goals. These goals will be discussed and documented during interview and on-going meetings, and it is the clients responsibility to update us if material changes occur. We will make ourselves reasonably available for communication. The firm does not generally limit the types of investments that it gives advice on. It does primarily use mutual funds, ETF’s and individual stocks for the management of assets.

CPWM may also use third party money managers (sub-advisors) to manage accounts based on the client’s needs. The sub-advisor will have discretionary authority to make investment decisions in the client account. These portfolios may include income and growth strategies executed primarily using mutual funds and ETF’s but may include individual issue stocks.

The firm may act as a solicitor on behalf of Creative One Wealth LLC in certain situations to provide investment advisory services to clients who have retirement plan assets with access to Fidelity Brokerage Link. The firm would only act as a solicitor in situations where it may not have access to directly affiliate with the custodian.

CPWM provides investment advisory services for clients who are participating in their company sponsored retirement plan. These assets would be held directly at the plan and through a custodian that is not directly accessible by the Advisor, we refer to these accounts as Held Away Accounts. The firm utilizes an Order Management System to regularly review the available investment options in these accounts, monitor them, re-balance and implement strategies in the same way as other accounts, though using different tools as necessary.

Financial Planning Services - CPWM offers advisory services in the form of financial planning. The firm does not generally charge a separate fee when we have been engaged under an Investment Advisory Agreement. Financial planning helps individuals identify short- and long-term goals, identify cash-flow needs and income sources, identify retirement needs and potential estate planning needs. Our role in performing financial planning is to help the client create clarity in providing planning services in those areas which they express interest or concern. The output of planning can be presented in a written format, but it will be up to the individual to decide how to receive or use our financial planning recommendations. In situations where the firm is not engaged for money management and there is no Investment Advisory Agreement, the hourly rate for financial planning is \$400.00 with a minimum fee of \$3,600.00. This fee may be charged as a single annual fee or an annual subscription billed monthly.

Retirement Plan Services – CPWM offers design and implementation of qualified retirement plans. This service requires the client to contract with a third-party administrator which will serve as record keeper. The firms role is generally limited to coordinating plan set up and creating investment options, including Target Date Funds, which participating employees select when contributing to a company sponsored qualified retirement plan. We will receive compensation as Investment Advisor and that compensation will be disclosed to employees and the plan sponsor. We do not participate in fees paid to the required third-party administrator.

If CPWM is providing Retirement Plan Services to a qualified retirement plan, and an individual participant wishes, we may be separately engaged to provide individual investment advice. This could present a conflict of interest because our fees for individual Portfolio Management Services will be higher than our Retirement Plan Services. We will resolve this potential conflict of interest by disclosing all fees which the client will be charged, what, if any, additional services will be received, and we will require a separate engagement with the individual receiving this service. In all cases we will only agree to provide separate services if we believe it will be in the client’s best interest.

CPWM does tailor its advisory services to the individual client needs. These tailored services are developed based the information gathered from the client. This information will be used to develop an individualized financial plan and investment proposal based on what we believe is in the client's best interest.

Clients may not impose restrictions on investing in certain securities or types of securities. The firm does not participate in wrap fee programs. As of 2/17/26 the firm manages \$60,520,000 on a discretionary basis and \$3,125,000 on a non-discretionary basis.

ITEM 3: Fees and Compensation

CPWM offers investment advisory services for a percentage of assets under management. Assets are aggregated by household for breakpoints. Fees are negotiable at certain asset levels. Management fees for both discretionary and non-discretionary assets are:

- Household assets from \$0 to \$999,999 – 1.35%
- Household assets from \$1,000,000 to \$1,999,999 – 1.25%
- Household assets from \$2,000,000 to \$2,999,999 – 1.15%
- Household assets above \$3,000,000 - negotiable

Example:

Mr. Smith IRA account value of \$650,000.00 and Mrs. Smith IRA account value of \$550,000
Household asset total: \$1,200,000
Management fee: 1.25%
Mr. Smith IRA monthly management fee calculation: $(\$650,000 \times 1.25\%) / 12 = \677.08
Mrs. Smith IRA monthly management fee calculation: $(\$550,000 \times 1.25\%) / 12 = \572.92

CPWM may provide investment advisory services for clients who are participating in their company sponsored retirement plan. These assets would be held directly at the plan and through a custodian that is not directly accessible by the Advisor. We refer to these accounts as Held Away Accounts. As it is impossible to directly debit fees from these Held Away Accounts, those fees will be assigned to another of the client's actively managed accounts that allows for direct billing. Fees will be calculated and processed in the same manner as the example above however the fee rate for Held Away Accounts will be 0.75% but may be negotiable.

All accounts will be billed in arrears monthly. Both discretionary assets and non-discretionary asset fees will be directly deducted from one or each of the clients discretionary accounts. A bill setting forth the amount of the fee will be sent to the custodian. The custodian will pay CPWM directly. The amount of the fee charged will appear on the client's monthly statement from the custodian. In addition to the management fee charged by CPWM, clients may incur other expenses involved with the management of the account(s). These fees may include custodian fees, commissions on the purchase or sale of securities or mutual fund expenses. For more information on brokerages see the Brokerage Practices section of this document. Clients whose accounts are being managed by a subadvisor are not charged any additional fees and the sub-advisor is compensated by CPWM from the assets under management fees CPWM charges to, and collects from, the client account(s). The firm does provide financial planning services for clients as needed as a part of the asset management fee.

CPWM also offers investment advisory services to businesses for multi-employee company sponsored retirement plans for a percentage of assets under management. Fees are negotiable at certain asset levels but begin at 0.85%. All accounts will be billed in arrears quarterly. The fee is calculated by the custodian based on the assets in the plan at the end of the quarter and deducted from the plan assets. The custodian will pay CPWM directly. Participants will receive an annual notice with a disclosure of the advisory fees. In addition to the advisory fee charged by CPWM, clients may incur other expenses involved with the operation of the account(s). These fees may include plan set up fees, custodian administration fees, commissions on the purchase or sale of securities or mutual fund expenses. For more information on brokerages see the Brokerage Practices section of this document.

Supervised persons of CPWM are actively engaged in selling products other than investment advice. Keith D. Hanson and Timothy E. Lanz are licensed to sell long-term care insurance, life insurance and annuities for which they are paid a commission. Receiving a commission may present a conflict of interest and may provide an incentive to recommend investment products based on the compensation received, rather than on a client's needs. Products sold by supervised persons of CPWM are done so based on the benefits provided by the specific product and are in the context of the other assets held by the client. The pros and cons of each product are discussed with each client to insure they are a proper fit for their goals. Clients of CPWM have the option to purchase recommended investment products through other brokers or agents that are not affiliated with the firm. There are no management fees charged for assets on which commissions are paid.

ITEM 3: Performance-Based Fees and Side-By-Side Management

CPWM has one private equity investment for which it may receive a performance-based fee—that is, a fee based on a share of capital gains on or capital appreciation of the assets of a client. If CPWM facilitates an investor subscribing and if at some point in the future the entity invested in is bought out, upon the retirement of the offering CPWM stands to participate in the gains of the offering—effectively a performance based fee. Receiving a performance based fee may present a conflict of interest and may provide an incentive to make a recommendation based on the compensation received, rather than on a client's needs. Assets charged performance based fees are only recommended to qualified clients based on suitability and the benefits provided by the specific investment in the context of the other assets held by the client. The pros and cons of each investment are discussed with each client to insure they are a proper fit for their goals.

ITEM 3: Types of Clients

CPWM generally provides investment advice to individuals, trusts, estates, corporations or charitable organizations. CPWM does not impose a minimum dollar value for starting or maintaining an account but will generally not engage in a new advisory relationship with individual clients with less than \$100,000 in assets to be managed.

ITEM 3: Methods of Analysis, Investment Strategies and Risk of Loss

CPWM's investment strategies incorporate both a traditional "buy and hold" philosophy as well as active portfolio management. The primary security analysis is done through charting, the technical analysis of markets and securities and fundamental analysis. The portfolios used to implement advice given to clients may include long and short term purchases, trading and short positions typically implemented through the use of inverse ETF's. The strategies employed typically do not involve frequent trading, however, in certain market situations trading frequency could increase significantly and this activity could result in increased transaction costs and taxes. Investing in securities involves risk of loss of appreciated or contributed capital clients should be prepared to bear.

Each of the CPWM and third party manager portfolio's have their own risks and should be considered by investors. The income portfolios may invest in individual corporate bonds but primarily invest in exchange traded funds and mutual funds. Risk of investing in corporate bonds include the possibility of a companies credit quality weakening and the value of the bond decreasing or the possibility of a default meaning the entire value of the bond would be lost. Exchange traded funds and mutual funds investing in bonds are less likely to face a complete loss of value due to the diversification of the positions held, however, the value of these funds can go down and macro economic conditions can adversely affect these types of investments. The growth portfolios invest in diversified mutual funds, ETF's and individual stocks. While the mutual funds and ETF's are diversified and do not generally face individual security bankruptcy risk, they can and do lose money. Stocks are not diversified and can lose all of their value. Both macro economic conditions and sector specific conditions can adversely affect these securities. In certain market environments we may own inverse funds to help hedge the portfolio against potential market drops. These funds can lose money if the underlying index should rise. Some portfolio's may use limited leverage thru mutual funds in some circumstances.

ITEM 4: Disciplinary Information

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of CPWM's advisory business or the integrity of its management.

ITEM 4: Other Financial Industry Activities and Affiliations

Supervised persons of CPWM are actively engaged in selling products other than investment advice. Keith D. Hanson and Timothy E. Lanz are licensed to sell long-term care insurance, life insurance and annuities for which they are paid a commission. Keith D. Hanson is a managing member Vault Sales Group, a manufactures sales rep group. He is a shareholder of Legacy WoundCare 360, LLC and FlyOverture LLC. Qualified accredited investors do invest in each of these and the firm may receive performance fees for investment in Legacy WoundCare 360. Cory Lagerstrom is a shareholder and board member of Creative One Wealth, a corporate RIA platform for advisors and a member of Hydroland Inc., a company which owns hydroelectric plants.

CPWM may recommend or select other third party investment advisors for its clients. Investments in these assets or with third party advisors are only recommended to qualified clients based on suitability and benefits provided by the specific investment or strategy and are in the context of the other assets held by the client. The pros and cons of each investment are discussed with each client to insure they are a proper fit for their goals and that any conflicts are disclosed.

Keith D. Hanson, Timothy E. Lanz, Cory L. Lagerstrom, Gary Bush and Kyle P. Nagy have ownership stakes in Clear Path Financial Group, LLC (CPFG), a management holding company, ClearPath Consulting & Insurance (CPCI) a consulting firm and ClearPath Tax & Accounting (CPTA), ClearPath Tax & Accounting II (CPTAII), ClearPath Tax & Accounting III (CPTAIII) and KPN Enterprises LLC (KPN), accounting practices. Clients of CPWM may engage KPN or CPTA for accounting services or CPCI for consulting services under a separate engagement agreement from the firms advisory contract.

ITEM 4: Code of Ethics, Participation or Interest in Client Transactions and Personal Trading

CPWM and related persons may recommend to clients, or buy or sell for client accounts, securities in which CPWM or a related person has a material financial interest. Specifically, Keith D. Hanson is a shareholder of Legacy WoundCare 360, LLC and FlyOverture, LLC. Qualified accredited investors do invest in each of these and the firm may receive a performance fee for investment in Legacy WoundCare 360. Mr. Hanson's private equity ownership and/or the firms performance fee may present a conflict of interest and may provide an incentive to make a recommendation based on that ownership or performance fee, rather than on a client's needs. Investments in these assets are only recommended to qualified clients based on suitability and the benefits provided by the specific investment and are in the context of the other assets held by the client. The pros and cons of each investment are discussed with each client to insure they are a proper fit for their goals and that any conflicts are disclosed.

Related persons of CPWM buy and sell the same securities for themselves and clients. In order to prevent trading ahead of clients and prevent conflicts of interest, block account orders are used to process trades placed directly by the firm. Using a block account, each client or related person receives the same fill price. In the case of mutual funds, all clients or related persons receive the same end of day closing price for the funds purchased. CPWM will provide a copy of its code of ethics to any client or prospective client upon request.

ITEM 4: Brokerage Practices

CPWM has the authority to determine, without obtaining specific client consent, the securities to be bought or sold, the amount of the securities to be bought or sold, the use of a third party money manager and the broker dealer to be used. The primary factor considered in selecting a broker dealer is cost. However, CPWM will also consider other factors such as the financial responsibility of the broker dealer, execution capabilities and the ongoing relationship of CPWM with the broker dealer. The value of the products, research and services given to CPWM will not be a factor in selecting the broker dealer and CPWM has no soft dollar arrangements. CPWM does not consider, in selecting or recommending a broker dealer, whether it or related persons, receive client referrals from a broker dealer, nor does it receive referrals from a broker dealer. CPWM has the authority to determine the broker dealer to be used. Not all advisors require clients to direct brokerage. By directing brokerage, CPWM may be unable to achieve a more favorable execution of client transactions, and the practice may cost the clients more money than if another broker dealer were used. CPWM has chosen to direct brokerage so that it can aggregate orders assuring all clients the same fill price on orders. CPWM does not have an economic relationship with a broker dealer that would create a mate-

ITEM 4: Review of Accounts

An investment advisor representative of CPWM will periodically review client accounts and/or financial plans. This will typically be done on at least an annual basis. This client review will cover portfolio performance as well as address any changes that have occurred in the clients situation. The clients financial plan and investment allocation will be adjusted if necessary based on any changes to the clients situation or suitability. Clients will receive a written account statement from the custodian on a monthly basis. This statement will provide the account value, positions held in the account, transactions that have occurred over the period and any management fees that were paid.

ITEM 4: Client Referrals and Other Compensation

CPWM, CPTA and KPN, accounting practices, have common ownership. Clients of CPWM may engage CPTA or KPN for accounting services and clients of CPTA or KPN may engage CPWM for money management services under separate engagement agreements. CPWM may compensate CPTA or KPN for client tax return preparation fees in certain circumstances where an individual or entity is a client of both firms.

CPWM has one private equity investment (Legacy WoundCare 360) for which it may receive a performance-based fee—that is, a fee based on a share of capital gains on or capital appreciation of the assets of a client. Receiving a performance-based fee may present a conflict of interest and may provide an incentive to recommend investment products based on the compensation received, rather than on a client's needs. Products sold by supervised persons of CPWM are done so based on suitability, the benefits provided by the specific product and are in the context of the other assets held by the client. The pros and cons of each product are discussed with each client to insure they are a proper fit for their goals.

CPWM may act as a solicitor on behalf of Creative One Wealth, LLC in certain situations to provide investment advisory services to clients who have retirement plan assets with access to Fidelity Brokerage Link. The firm would only act as a solicitor in situations where it may not have access to directly affiliate with the custodian.

ITEM 5: Custody

CPWM does not take custody of client assets.

ITEM 5: Investment Discretion

CPWM has discretionary authority to manage securities accounts on behalf of clients. CPWM has the authority to determine, without obtaining specific client consent, the securities to be bought or sold, the broker dealer to be used, a third party money manager to use and the deduction of management fees. This authority is granted through the completion of the account application and the CPWM Advisory Contract.

ITEM 5: Voting Client Securities

CPWM does not vote on client securities. Typically, clients will receive their proxies or other solicitations directly from the custodian or transfer agent. Clients can contact CPWM with questions about any particular solicitation.

ITEM 5: Financial Information

CPWM does not require, nor solicit, any prepayment of management fees in advance. Because fees are charged in arrears, there are no financial conditions that would be reasonably likely to impair the firms ability to meet contractual commitments to clients.

ITEM 5: Requirements for State-Registered Advisors

The following is a list of the education and business backgrounds for each of the principal executives and management persons of CPWM. Please refer to ADV Part 2B Supplemental Brochures for more information regarding the executive officers and management persons.

Timothy Edwards Lanz

Education:

Bachelor of Science, Kansas State University, Manhattan Kansas, Majors: International Business, Management, Marketing

Work Experience:

ClearPath Consulting & Insurance—April 2022 to present—Member
Clear Path Financial Group—October 2020 to present—Member, Chief Operations Officer
KPN Enterprises—October 2020 to present—Member
ClearPath Tax & Accounting—October 2020 to present—Member
ClearPath Tax & Accounting II—May 2024 to present—Member
ClearPath Tax & Accounting III—October 2025 to present—Member
ClearPath Wealth Management—June 1998 to present—Partner/Investment Advisor Representative
Blue River Capital LLC—March 2014 to December 2019—Partner/Investment Advisor Representative

Keith Duane Hanson

Education:

Bachelor of Arts, Bob Jones University, Greenville, SC, Majors: Theology, Speech Communication
Master of Business Administration, University of St. Mary

Work Experience:

ClearPath Consulting & Insurance—April 2022 to present—Member
Clear Path Financial Group—October 2020 to present—Member, Director of Business Development
KPN Enterprises—October 2020 to present—Member
ClearPath Tax & Accounting—October 2020 to present—Member
ClearPath Tax & Accounting II—May 2024 to present—Member
ClearPath Tax & Accounting III—October 2025 to present—Member
ClearPath Wealth Management—June 2018 to present—Partner/Investment Advisor Representative
Legacy Advisory Group, LLC—2007 to June 2018—Investment Advisor Representative

Cory L. Lagerstrom

Education:

Juris Doctor—University of Kansas
Bachelor of Arts, University of Kansas

Work Experience:

ClearPath Wealth Management—July 2024 to present—Member, Investment Advisor Representative, Director of Wealth Mgt.
KPN Enterprises—July 2024 to present—Member
ClearPath Financial Group—July 2024 to present—Director of Wealth Management—Member
ClearPath Tax & Accounting —July 2024 to present—Member
ClearPath Tax & Accounting II —May 2024 to present—Member
ClearPath Tax & Accounting III —October 2025 to present—Member
ClearPath Consulting & Insurance —July 2024 to present—Member
Hydroland—December 2020 to Present—Member and CEO
Creative One Wealth— May 2015 to May 2023—Member

Supervised persons of CPWM are actively engaged in selling products other than investment advice. Keith D. Hanson and Timothy E. Lanz are licensed to sell long-term care insurance, life insurance and annuities for which they are paid a commission. In addition, both of them and Cory L. Lagerstrom have ownership stakes in CPFG, a management holding company, ClearPath Consulting & Insurance a consulting firm, ClearPath Tax & Accounting, ClearPath Tax & Accounting II, ClearPath Tax & Accounting III and KPN Enterprises, accounting practices. Clients of CPWM may engage CPTA and KPN for accounting services under a separate engagement agreement from the firms advisory contract. Approximately 5% of the firms time is spent on activities other than giving investment advice.

Keith D. Hanson is a managing member of Vault Sales Group. He is a shareholder of Legacy WoundCare 360, LLC and FlyOverture, LLC. Qualified accredited investors do invest in both of these and the firm may receive performance fees for investments in Legacy WoundCare 360. This fee is calculated based on a percentage of the gain on the investment at the time of its liquidation. Performance-based compensation may create an incentive for the advisor to recommend an investment that may carry a higher degree of risk to the client.

Cory L. Lagerstrom owns an interest in Hydroland Inc. which owns hydroelectric plants and he is the CEO. He is a shareholder and board member of Creative One Wealth, a corporate RIA platform for small and midsize advisors.

ADV PART 2B BROCHURE SUPPLEMENT

2/17/2026

TIMOTHY E. LANZ

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This brochure supplement provides information about Timothy E. Lanz that supplements the ClearPath Wealth Management brochure. You should have received a copy of that brochure. Please contact Timothy E. Lanz, partner, if you did not receive ClearPath Wealth Management's brochure or if you have any questions about the contents of this supplement.

Additional information about Timothy E. Lanz is available on the SEC's website at www.adviserinfo.sec.gov.

Education Background and Business Experience

Born: 1972

Education:

Bachelor of Science, Kansas State University, Manhattan Kansas, Majors: Intl. Business, Management, Marketing

Work Experience:

ClearPath Consulting & Insurance—April 2022 to present—Member

Clear Path Financial Group—October 2020 to present—Member, Chief Operations Officer

KPN Enterprises—October 2020 to present—Member

ClearPath Tax & Accounting—October 2020 to present—Member

ClearPath Tax & Accounting II—May 2024 to present—Member

ClearPath Tax & Accounting III—October 2025 to present—Member

ClearPath Wealth Management—June 1998 to present—Partner/Investment Advisor Representative

Blue River Capital LLC—March 2014 to December 2019—Partner/Investment Advisor Representative

Disciplinary Information

There are no legal or disciplinary events material to a client's or prospective client's evaluation of Timothy E. Lanz.

Other Business Activities

Timothy E. Lanz has an ownership stake in Clear Path Financial Group, a management holding company ClearPath Consulting & Insurance, a consulting firm, ClearPath Tax & Accounting II, accounting practice and KPN Enterprises, an accounting practice.

Additional Compensation

There are no additional undisclosed arrangements with anyone who is not a client for which Timothy E. Lanz receives economic benefit.

Supervision

CPWM does not generally limit the types of investments it gives advise on. The firm will manage client portfolios on a discretionary basis. It manages its own proprietary growth and income portfolios as well as incorporates the use of third party money managers. Prior to opening any account the firm will review the clients stated goals and objectives to confirm their alignment with the goals and objectives of the portfolio in which they are investing. Timothy E. Lanz (partner, 913-336-3500) is in charge of supervising advisory activities on behalf of ClearPath Wealth Management.

Requirements for State-Registered Advisors

Timothy E. Lanz has not been involved in any arbitration claim nor has he been found liable in any civil, self-regulatory organization or administrative proceeding. Timothy E. Lanz has not been the subject of any bankruptcy petition.

ADV PART 2B BROCHURE SUPPLEMENT

2/17/2026

KEITH D. HANSON

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This brochure supplement provides information about Keith D. Hanson that supplements the ClearPath Wealth Management brochure. You should have received a copy of that brochure. Please contact Timothy E. Lanz, partner, if you did not receive ClearPath Wealth Management's brochure or if you have any questions about the contents of this supplement.

Additional information about Keith D. Hanson is available on the SEC's website at www.adviserinfo.sec.gov.

Education Background and Business Experience

Born: 1976

Education:

Bachelor of Arts, Bob Jones University, Greenville, SC, Majors: Theology, Speech Communication
Masters of Business Administration, University of St. Mary

Work Experience:

ClearPath Consulting & Insurance—April 2022 to present—Member
Clear Path Financial Group—October 2020 to present—Member, Director of Business Development
KPN Enterprises—October 2020 to present—Member
ClearPath Tax & Accounting—October 2020 to present—Member
ClearPath Tax & Accounting II—May 2024 to present—Member
ClearPath Tax & Accounting III—October 2025 to present—Member
ClearPath Wealth Management—June 2018 to present—Partner/Investment Advisor Representative
Legacy Advisory Group, LLC—2007 to June 2018—Investment Advisor Representative

Disciplinary Information

There are no legal or disciplinary events material to a client's or prospective client's evaluation of Keith D. Hanson.

Other Business Activities

Keith D. Hanson has an ownership stake in Clear Path Financial Group, a management holding company, ClearPath Consulting & Insurance, a consulting firm ClearPath Tax & Accounting II, an accounting practice and KPN Enterprises, an accounting practice. He owns an interest in Vault Sales Group, LLC, a manufactures sales rep for small consumer products. He is a shareholder of Legacy WoundCare 360, LLC and FlyOverture, LLC. He may receive compensation from distributions of revenue to owners for each. It is unknown the amounts of revenue which may be distributed on an annual basis.

Additional Compensation

There are no additional undisclosed arrangements with anyone who is not a client for which Keith D. Hanson receives economic benefit.

Supervision

CPWM does not generally limit the types of investments it gives advise on. The firm will manage client portfolios on a discretionary basis. It manages its own proprietary growth and income portfolios as well as incorporates the use of third party money managers. Prior to opening any account the firm will review the clients stated goals and objectives to confirm their alignment with the goals and objectives of the portfolio in which they are investing. Timothy E. Lanz (partner, 913-336-3500) is in charge of supervising advisory activities on behalf of ClearPath Wealth Management.

Requirements for State-Registered Advisors

Keith D. Hanson has not been involved in any arbitration claim nor has he been found liable in any civil, self-regulatory organization or administrative proceeding. Keith D. Hanson has not been the subject of any bankruptcy petition.

ADV PART 2B BROCHURE SUPPLEMENT

2/17/2026

CORY L. LAGERSTROM

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This brochure supplement provides information about Cory L. Lagerstrom that supplements the ClearPath Wealth Management brochure. You should have received a copy of that brochure. Please contact Timothy E. Lanz, partner, if you did not receive ClearPath Wealth Management's brochure or if you have any questions about the contents of this supplement.

Additional information about Cory L. Lagerstrom is available on the SEC's website at www.adviserinfo.sec.gov.

Education Background and Business Experience

Born: 1972

Education:

Juris Doctor—University of Kansas
Bachelor of Arts, University of Kansas

Work Experience:

ClearPath Wealth Management—July 2024 to present—Member, Investment Advisor Representative, Director of Wealth Mgt.
KPN Enterprises—July 2024 to present—Member
ClearPath Financial Group—July 2024 to present—Director of Wealth Management—Member
ClearPath Tax & Accounting —July 2024 to present—Member
ClearPath Tax & Accounting II —May 2024 to present—Member
ClearPath Tax & Accounting III —October 2025 to present—Member
ClearPath Consulting & Insurance —July 2024 to present—Member
Hydroland—December 2020 to Present—Member and CEO
Creative One Wealth— May 2015 to May 2023—Member

Disciplinary Information

There are no legal or disciplinary events material to a client's or prospective client's evaluation of Cory L. Lagerstrom.

Other Business Activities

Cory L. Lagerstrom has an ownership stake in ClearPath Financial Group, a management holding company, ClearPath Consulting & Insurance, a consulting firm, ClearPath Tax & Accounting II an accounting practice and KPN Enterprises, an accounting practice. He owns an interest in Hydroland Inc. which owns hydroelectric plants and he is the CEO . He is a shareholder and board member of Creative One Wealth, a corporate RIA platform for small and midsize advisors.

Additional Compensation

There are no additional undisclosed arrangements with anyone who is not a client for which Cory L. Lagerstrom receives economic benefit.

Supervision

CPWM does not generally limit the types of investments it gives advise on. The firm will manage client portfolios on a discretionary basis. It manages its own proprietary growth and income portfolios as well as incorporates the use of third party money managers. Prior to opening any account the firm will review the clients stated goals and objectives to confirm their alignment with the goals and objectives of the portfolio in which they are investing. Timothy E. Lanz (partner, 913-336-3500) is in charge of supervising advisory activities on behalf of ClearPath Wealth Management.

Requirements for State-Registered Advisors

Cory L. Lagerstrom has not been involved in any arbitration claim nor has he been found liable in any civil, self-regulatory organization or administrative proceeding. Cory L. Lagerstrom has not been the subject of any bankruptcy petition.

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This brochure supplement provides information about Meghan D. Hein that supplements the ClearPath Wealth Management brochure. You should have received a copy of that brochure. Please contact Timothy E. Lanz, partner, if you did not receive ClearPath Wealth Management's brochure or if you have any questions about the contents of this supplement.

Additional information about Meghan D. Hein is available on the SEC's website at www.adviserinfo.sec.gov.

Education Background and Business Experience

Born: 2001

Education:

Bachelor of Science—Texas A&M University

Work Experience:

ClearPath Wealth Management—9/2/2025 to present— Investment Advisor Representative, Senior Planning Associate

Aspyre Wealth Partners—7/17/2024 to 8/12/2025— Investment Advisor Representative, Financial Planning Associate

Carson Group—06/03/2023 to 06/14/2024—Investment Advisor Representative, Partner Development Associate

Disciplinary Information

There are no legal or disciplinary events material to a client's or prospective client's evaluation of Meghan D. Hein.

Other Business Activities

Meghan D. Hein is not engaged in any investment-related business or occupation (other than this advisory firm).

Additional Compensation

There are no additional undisclosed arrangements with anyone who is not a client for which Meghan D. Hein receives economic benefit.

Supervision

CPWM does not generally limit the types of investments it gives advise on. The firm will manage client portfolios on a discretionary basis. It manages its own proprietary growth and income portfolios as well as incorporates the use of third party money managers. Prior to opening any account the firm will review the clients stated goals and objectives to confirm their alignment with the goals and objectives of the portfolio in which they are investing. Timothy E. Lanz (partner, 913-336-3500) is in charge of supervising advisory activities on behalf of ClearPath Wealth Management.

Requirements for State-Registered Advisors

Meghan D. Hein has not been involved in any arbitration claim nor has he been found liable in any civil, self-regulatory organization or administrative proceeding. Meghan D. Hein has not been the subject of any bankruptcy petition.

ADV PART 2 BROCHURE ADDENDUM

ClearPath Wealth Management, L.C. does carry professional liability insurance coverage for its investment advisory services. In the event any client or prospective client requests proof of professional liability insurance coverage, the investment advisor shall within 30 days provide a copy of the insurance agreement that is in effect.