Brochure Supplement – Maximillian Morgan

Maximillian Morgan's Contact Information is:

Maximillian Morgan
Chief Compliance Officer, Business Development Officer
LookAhead Wealth LLC
1980 Willamette Falls Drive, Suite 260
West Linn, Oregon 97068
https://Lookaheadwealth.com
max@lookaheadadvisory.com
503.832.0165

This brochure provides information about the qualifications and business practices of Maximillian Morgan. If you have any questions about the contents of this brochure, please contact us at max@lookaheadadvisory.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 Maximillian Morgan also is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2- Education and Background and Business Experience

Maximillian Morgan
Chief Compliance Officer, Business Development Officer

Birthdate: 1981

Education: Bachelor of Arts – Social Science – Eastern Oregon University, 2006

Business Background:
Nov 2024-Present – Chief Compliance Officer, Business Development Officer, LookAhead Wealth LLC.
Feb 2016-Nov 2024 – Chief Compliance Officer, Business Development Officer, member, Investment Design Management LLC.
2013-2016 – Managing Director, Risk Investment
2012-2013 – Account Manager, Aequitas Capital Management, Inc.

Item 3 – Disciplinary Information

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. Effective as of May 7, 2025, Mr. Morgan entered into a consent order with the Washington Department of Financial Institutions regarding a violation of the investment adviser rules relating to registration requirements set forth in RCW 21.20.040 resulting in a small fine and administrative fees relating to such violation.

Item 4 – Other Business Activity

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person aids in bookkeeping, records management and general business affairs of Luxe Atelier, a luxury skincare spa in Lake Oswego, Oregon that the supervised person maintains a beneficial ownership interest in.

Item 5 – Additional Compensation

No additional outside compensation is received.

Item 6 - Supervision

Mr. Morgan serves as an investment adviser representative of LookAhead Wealth LLC ("LookAhead"), as well as performing all operational and executive functions as the Chief Compliance Officer. Mr. Morgan's full contact information is included on the cover of this Supplement.

LookAhead has implemented a code of ethics and internal compliance policies that guide each employee in meeting their fiduciary obligations. As the CCO of LookAhead, Mr. Morgan is an employee of the company providing investment services to clients and must comply with the compliance policies.

Further, LookAhead is subject to regulatory oversight by the Oregon Division of Financial Regulations (“ODFR”) and Washington State Department of Financial Institutions (“DFI”). This agencies require registration by LookAhead and its supervised persons. As a registered entity, LookAhead is subject to examinations by regulators, which will be announced or unannounced. LookAhead is required to periodically update the information provided to the ODFR and DFI and to provide various reports regarding firm business and assets.

Mr. Morgan, self supervises his activities and can be reached at the contact information included on the cover page of this supplement.

Brochure Supplement – Elijah Bo Lyons, CFP®

Elijah Bo Lyons' Contact Information is:

Elijah Bo Lyons
LookAhead Wealth LLC
1980 Willamette Falls Drive, Suite 260
West Linn, Oregon 97068
https://Lookaheadwealth.com
bo@lookaheadwealth.com
503-878-7417

This brochure provides information about the qualifications and business practices of Elijah Bo Lyons. If you have any questions about the contents of this brochure, please contact us at max@lookaheadadvisory.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 Maximillian Morgan also is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2- Education and Background and Business Experience

Elijah Bo Lyons ("Bo")

Birthdate: 2000

Education: Bachelor of Arts and Master's – Business Administration – Freed-Hardeman University, 2022

Business Background:
August 2025-Present – Investment Adviser Representative - LookAhead Wealth LLC
July 2022-May 2025 – Investment Adviser Representative - Southern Capital Advisors, LLC

Bo is also a Certified Financial Planner™.

The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP® (with flame design) marks (collectively, the "CFP® marks") are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP® Board").

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients. As of 2025, more than 100,000 individuals have obtained CFP® certification in the United States.

Bo completed the requirements that were in effect at the time of his certification. Currently, to attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- Education – Complete an advanced, college-level course of study addressing the financial planning subject areas that CFP® Board's studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a bachelor's degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP® Board's financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;

- Examination – Pass the comprehensive CFP® Certification Examination. The examination includes case studies and client scenarios designed to test one's ability to correctly diagnose financial planning issues and apply one's knowledge of financial planning to real world circumstances;

- Experience – (1) Complete at least three years (at least 6,000 hours) of full-time financial planning-related experience; or (2) complete at least two years (at least 4,000) of full-time financial planning-related experience while under the supervision of a CFP® professional; and

- Ethics – Agree to be bound by CFP® Board's Code of Ethics and Standards of Conduct, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- Continuing Education – Complete thirty hours of continuing education hours every two years, including two hours on the Code of Ethics and other parts of the Standards of Conduct, to maintain competence and keep up with developments in the financial planning field; and

- Ethics – Renew an agreement to be bound by the Code of Ethics and Standards of Conduct. The Standards prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to permanent revocation of their CFP® certification by the CFP Board.

Item 3 – Disciplinary Information

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. Bo has no required disclosures under this item.

Item 4 – Other Business Activity

The supervised person is not actively engaged in any other investment-related businesses or occupations.

Item 5 – Additional Compensation

No additional outside compensation is received.

Item 6 - Supervision

Bo serves as an investment adviser representative of LookAhead. Bo's full contact information is included on the cover of this Supplement.

LookAhead has implemented a code of ethics and internal compliance policies that guide each employee in meeting their fiduciary obligations. Bo is an employee of the company providing investment services to clients and must comply with the compliance policies.

Further, LookAhead is subject to regulatory oversight by the Oregon Division of Financial Regulations ("ODFR") and Washington State Department of Financial Institutions ("DFI"). This agencies require registration by LookAhead and its supervised persons. As a registered entity, LookAhead is subject to examinations by regulators, which will be announced or unannounced. LookAhead is required to periodically update the information provided to the ODFR and DFI and to provide various reports regarding firm business and assets.

My supervisor is: Maximillian Morgan, Chief Compliance Officer and Business Development Officer.

Supervisor telephone number: 503.832.0165

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