

**ITEM 1: COVER PAGE FOR PART 2B OF FORM ADV:  
BROCHURE SUPPLEMENT**

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**DATED: MARCH 2024**

**BARRY SCOTT RHONEMUS**

**JUNCTURE WEALTH STRATEGIES, LLC  
8777 E. VIA DE VENTURA, SUITE 120  
SCOTTSDALE, AZ 85258  
P: (480) 253-4100**

**FIRM CONTACT:  
JACK BARKER,  
CHIEF COMPLIANCE OFFICER**

**FIRM WEBSITE ADDRESS:  
[WWW.JUNCTUREWEALTH.COM](http://WWW.JUNCTUREWEALTH.COM)**

This brochure supplement provides information about Mr. Rhonemus that supplements our brochure. You should have received a copy of that brochure. Please contact Jack Barker, Chief Compliance Officer, if you did not receive our firm's brochure or if you have any questions about the contents of this supplement.

Additional information about Barry S. Rhonemus is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching CRD #2801533.

## **ITEM 2. EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE**

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### **Barry Scott Rhonemus**

**Year of Birth:** 1966

**Formal Education:**

- Ohio University – 1989, B.S. in Chemical Engineering

**Business Background (for the past 5 years):**

- Juncture Wealth Strategies, LLC: Managing Member, 2010 – Present
- Geronimo, LLC: Managing Member, 2022 - Present
- Heritage Wealth Management, LLC; Managing Member, 2017 - 2018
- Purshe Kaplan Sterling Investments, Inc.: Registered Representative, 2010 – 2017
- Wells Fargo Investments, LLC: Wealth Advisor, 2000 – 2010
- Wells Fargo Brokerage Services, LLC: Wealth Advisor, 2001 – 2002
- Wells Fargo Securities Inc.: Wealth Advisor, 1998 – 2001

**Exams, Licenses and Other Professional Designations:**

- 2011 - Uniform Investment Adviser Law Examination (Series 65)

## **ITEM 3. DISCIPLINARY INFORMATION**

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We have nothing to disclose in this regard.

## **ITEM 4. OTHER BUSINESS ACTIVITIES**

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Mr. Rhonemus is a licensed insurance agent and in such capacity, may recommend, on a fully-disclosed commission basis, the purchase of certain insurance products. When such recommendations or sales are made, a conflict of interest exists as Mr. Rhonemus may earn an insurance commission for the sale of those products, which may create an incentive to recommend such products. Clients are under no obligation to purchase insurance products from Mr. Rhonemus.

Mr. Rhonemus has other business activities that are unrelated to the investment advisory industry and do not impact or affect his role as CEO of Juncture Wealth Strategies.

## **ITEM 5. ADDITIONAL COMPENSATION**

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We have nothing to disclose in this regard.

## **ITEM 6. SUPERVISION**

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Jack Barker, Chief Compliance Officer, supervises and monitors Mr. Rhonemus' activities on a regular basis to ensure compliance with our firm's Code of Ethics. Please contact Mr. Barker if you have any questions about Mr. Rhonemus' brochure supplement at 480-253-4102

**ITEM 1: COVER PAGE FOR PART 2B OF FORM ADV:  
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**DATED: MARCH 2024**

**JACK A. BARKER**

**JUNCTURE WEALTH STRATEGIES, LLC  
8777 E. VIA DE VENTURA, SUITE 120  
SCOTTSDALE, AZ 85258  
P: (480) 253-4100**

**FIRM CONTACT:  
JACK BARKER,  
CHIEF COMPLIANCE OFFICER**

**FIRM WEBSITE ADDRESS:  
WWW.JUNCTUREWEALTH.COM**

This brochure supplement provides information about Mr. Barker that supplements our Form ADV Part 2A brochure. You should have received a copy of that brochure. Please contact Mr. Barker if you did not receive our firm's brochure or if you have any questions about the contents of this supplement.

Additional information about Jack Barker is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching CRD#: 2570575.

## ITEM 2. EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

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### **Jack Andrew Barker**

**Year of Birth:** 1969

**Formal Education:**

- University of Nebraska College of Law – 1994; J.D.
- Texas Christian University – 1991; B.B.A. Accounting

**Business Background (for the past 5 years):**

- Juncture Wealth Strategies, LLC: Chief Compliance Officer, 2013 – Present
- Heritage Wealth Management, LLC; Managing Member, 2017 - 2018
- Wells Fargo Bank: Sr. Regional Fiduciary Manager, 2008 – 2013
- Wells Fargo Investments: Wealth Management Specialist, 2006 – 2008
- JPMorgan Chase: Financial Planning Director, 2003 – 2006

**Exams, Licenses and Other Professional Designations:**

- 2013 – Uniform Investment Adviser Law Examination (Series 65)
- 2009 – Certified Trust and Financial Advisor (CTFA)
- Certified Public Accountant (CPA), Texas (1996), Arizona (2017)

***Certified Public Accountant (CPA)***

Mr. Barker has a professional designation, Certified Public Accountant. CPAs are licensed and regulated by their state boards of accountancy. Experience and testing requirements for licensure as a CPA generally include minimum college education, minimum experience levels, and successful passage of the Uniform CPA Examination. In order to maintain a CPA license, states generally require the completion of continuing professional education. 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.

***Certified Trust and Financial Advisor (CTFA)***

Mr. Barker has a professional designation, Certified Trust and Financial Advisor, which is offered by the American Bankers Association for financial professionals. The mark provides training and knowledge in taxes, investments, financial planning, trust and estates. To achieve the CTFA designation, candidates must have a minimum of three years experience in wealth management along with the completion of an ICB (Institute of Certified Bankers) trust training program. Candidates can also have five years experience in wealth management along with a bachelor's degree or ten years experience in wealth management. To go along with the prerequisites, candidates must also have a letter of recommendation attesting to their experience and ethical character, sign a professional code of ethics and successfully pass an examination.

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## ITEM 3. DISCIPLINARY INFORMATION

We have nothing to disclose in this regard.

#### **ITEM 4. OTHER BUSINESS ACTIVITIES**

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Mr. Barker does not participate in any additional outside business that is considered substantial to disclose.

#### **ITEM 5. ADDITIONAL COMPENSATION**

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We have nothing to disclose in this regard.

#### **ITEM 6. SUPERVISION**

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Barry Rhonemus is a principal of our firm and as such supervises and monitors Mr. Barker's activities on a regular basis to ensure compliance with our firm's Code of Ethics. Please contact Mr. Rhonemus if you have any questions about Mr. Barker's brochure supplement at 480-253-4103.

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**DATED: MARCH 2024**

**BRADLEY HAINES**

**JUNCTURE WEALTH STRATEGIES, LLC  
8777 E. VIA DE VENTURA, SUITE 120  
SCOTTSDALE, AZ 85258  
PHONE: 480.253.4100**

**FIRM CONTACT:  
JACK BARKER, CHIEF COMPLIANCE OFFICER**

**WEBSITE:  
[WWW.JUNCTUREWEALTH.COM](http://WWW.JUNCTUREWEALTH.COM)**

This brochure supplement provides information about Mr. Haines that supplements our Form ADV Part 2A brochure. You should have received a copy of that brochure. Please contact Jack Barker, Chief Compliance Officer, if you did not receive our firm's brochure or if you have any questions about the contents of this supplement.

Additional information about Bradley Haines is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching CRD #2571132.

## ITEM 2. EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

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### **Bradley Haines**

**Year of Birth:** 1970

**Formal Education:**

- Gonzaga University – 2000, MBA
- Brigham Young University – 1994, B.S. in Business Management and Finance

**Business Background (for the past 5 years):**

- Juncture Wealth Strategies, LLC: Chief Investment Officer, 2018 - Present
- Juncture Wealth Strategies, LLC: Investment Advisor Representative, 2015 – Present
- Heritage Wealth Management, LLC; Managing Member, 2017 - 2018
- Wells Fargo: Senior Investment Strategist, 2002 – 2015

**Exams, Licenses and Other Professional Designations:**

- 2004 – Financial Risk Manager (FRM)
- 2000 – Chartered Financial Analyst (CFA)
- 1995 – Uniform Investment Adviser Law Examination (Series 65)
- 1995 – Uniform Securities Agent State Law Examination (Series 63)

***Financial Risk Manager (FRM)***

A financial designation, obtained through the Global Association of Risk Professionals (GARP) by achieving a passing score on the Financial Risk Manager (FRM) examination, having an active membership in GARP and by having two years of experience in financial risk management.

The FRM program and exam, follows the major strategic disciplines of risk management: market risk, credit risk, operational risk and investment management.

***Chartered Financial Analyst (CFA)***

The Chartered Financial Analyst (CFA) charter is a globally respected, graduate-level investment credential established in 1962 and awarded by CFA Institute.

To earn the CFA charter, candidates must: 1) pass three sequential, six-hour examinations; 2) have at least four years of qualified professional investment experience; 3) join CFA Institute as members; and 4) commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct. The CFA Program curriculum is updated every year by experts from around the world to ensure that candidates learn the most relevant and practical new tools, ideas, and investment and wealth management skills to reflect the dynamic and complex nature of the profession.

## ITEM 3. DISCIPLINARY INFORMATION

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We have nothing to disclose in this regard.

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**ITEM 4. OTHER BUSINESS ACTIVITIES**

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Mr. Haines does not have any outside business activities to report.

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**ITEM 5. ADDITIONAL COMPENSATION**

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We have nothing to disclose in this regard.

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**ITEM 6. SUPERVISION**

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Jack Barker, Chief Compliance Officer, supervises and monitors Mr. Haines's activities on a regular basis to ensure compliance with our firm's Code of Ethics. Please contact Mr. Barker if you have any questions about Mr. Haines's brochure supplement at 480-253-4102.



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**DATED: MARCH 2024**

**WANDA STAPLEY**

**JUNCTURE WEALTH STRATEGIES, LLC  
8777 E. VIA DE VENTURA, SUITE 120  
SCOTTSDALE, AZ 85258  
P: (480) 253-4100**

**FIRM CONTACT:  
JACK BARKER,  
CHIEF COMPLIANCE OFFICER**

**FIRM WEBSITE ADDRESS:  
WWW.JUNCTUREWEALTH.COM**

This brochure supplement provides information about Mr. Barker that supplements our Form ADV Part 2A brochure. You should have received a copy of that brochure. Please contact Mr. Barker if you did not receive our firm's brochure or if you have any questions about the contents of this supplement.

Additional information about Wanda Stapley is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching CRD#: 1872814.

## **ITEM 2. EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE**

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### **Wanda Stapley**

**Year of Birth:** 1962

**Formal Education:**

- Parks Jr. College – 1987, Diploma, Word Processing

**Business Background (for the past 5 years):**

- Juncture Wealth Strategies, LLC: Investment Advisor Representative, 2010 – Present
- Purshe Kaplan Sterling Investments: Registered Representative, 2010 – 2017
- Wells Fargo Investments, LLC: Client Associate, 2000 – 2010

**Professional Designations:**

- 2016 – Uniform Investment Adviser Law Examination (Series 65)

## **ITEM 3. DISCIPLINARY INFORMATION**

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We have nothing to disclose in this regard.

## **ITEM 4. OTHER BUSINESS ACTIVITIES**

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Ms. Stapley is a licensed insurance agent and in such capacity, may recommend, on a fully-disclosed commission basis, the purchase of certain insurance products. When such recommendations or sales are made, a conflict of interest exists as Ms. Stapley may earn an insurance commission for the sale of those products, which may create an incentive to recommend such products. Clients are under no obligation to purchase insurance products from Ms. Stapley.

## **ITEM 5. ADDITIONAL COMPENSATION**

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We have nothing to disclose in this regard.

## **ITEM 6. SUPERVISION**

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Jack Barker, Chief Compliance Officer, supervises and monitors Ms. Stapley's activities on a regular basis to ensure compliance with our firm's Code of Ethics. Please contact Mr. Barker if you have any questions about Ms. Stapley's brochure supplement at 480-253-4102.

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**DATED: MARCH 2024**

**TYLER ROBERT KARL**

**JUNCTURE WEALTH STRATEGIES, LLC  
8777 E. VIA DE VENTURA, SUITE 120  
SCOTTSDALE, AZ 85258  
PHONE: 480.253.4100**

**FIRM CONTACT:  
JACK BARKER, CHIEF COMPLIANCE OFFICER**

**WEBSITE:  
[WWW.JUNCTUREWEALTH.COM](http://WWW.JUNCTUREWEALTH.COM)**

This brochure supplement provides information about Mr. Karl that supplements our Form ADV Part 2A brochure. You should have received a copy of that brochure. Please contact Jack Barker, Chief Compliance Officer, if you did not receive our firm's brochure or if you have any questions about the contents of this supplement.

Additional information about Tyler Karl is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching CRD #6331334.

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## ITEM 2. EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

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### **Tyler Robert Karl**

**Year of Birth:** 1993

**Formal Education:**

- Arizona Christian University – 2014, Bachelors of Science, Business Administration

**Business Background (for the past 5 years):**

- Juncture Wealth Strategies, LLC: Investment Adviser Representative, 2017 – Present
- Heritage Wealth Management: Investment Adviser Representative, 2016 – 2018
- Charles Schwab & Co: Registered Representative 2015-2016
- Northwestern Mutual: Intern, 2014-2015
- Youfit Health Clubs: Maintenance and Marketing, 2013-2014
- Hollister Inc.: Model, 2012-2013

**Exams, Licenses and Other Professional Designations:**

- 2016 – Uniform Investment Adviser Law Examination (Series 65)
- 2015 – Uniform Securities Agent State Law Examination (Series 63)

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## ITEM 3. DISCIPLINARY INFORMATION

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We have nothing to disclose in this regard.

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## ITEM 4. OTHER BUSINESS ACTIVITIES

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Mr. Karl does not have any outside business activities to report.

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## ITEM 5. ADDITIONAL COMPENSATION

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We have nothing to disclose in this regard.

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## ITEM 6. SUPERVISION

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Jack Barker, Chief Compliance Officer, supervises and monitors Mr. Karl's activities on a regular basis to ensure compliance with our firm's Code of Ethics. Please contact Mr. Barker if you have any questions about Mr. Karl's brochure supplement at 480-253-4102.

**ITEM 1: COVER PAGE FOR PART 2B OF FORM ADV:  
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**DATED: MARCH 2024**

**CONNOR PIERCE SMITH**

**JUNCTURE WEALTH STRATEGIES, LLC  
8777 E. VIA DE VENTURA, SUITE 120  
SCOTTSDALE, AZ 85258  
P: (480) 253-4100**

**FIRM CONTACT:  
JACK BARKER,  
CHIEF COMPLIANCE OFFICER**

**FIRM WEBSITE ADDRESS:  
[WWW.JUNCTUREWEALTH.COM](http://WWW.JUNCTUREWEALTH.COM)**

This brochure supplement provides information about Mr. Smith that supplements our brochure. You should have received a copy of that brochure. Please contact Jack Barker, Chief Compliance Officer, if you did not receive our firm's brochure or if you have any questions about the contents of this supplement.

Additional information about Connor Smith is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching CRD #6539351.

## **ITEM 2. EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE**

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### **Connor Pierce Smith**

**Year of Birth:** 1992

**Formal Education:**

- Ashland University, 2011, student
- Ohio University, 2012 – 2015, BBA-Finance degree

**Business Background (for the past 5 years):**

- Juncture Wealth Strategies, LLC: Investment Advisor Representative 2017 – Present
- 2E Limited: Owner 2022 - Present
- Arbuckle-Phayer Accounting Group, 2017: Employee Associate - Present
- Heritage Wealth Management, LLC: Investment Advisor Representative, 2017
- Ameriprise Financial, 2015 - 2017

**Exams, Licenses and Other Professional Designations:**

- 2015 - Uniform Combined State Law Examination (Series 66)

## **ITEM 3. DISCIPLINARY INFORMATION**

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We have nothing to disclose in this regard.

## **ITEM 4. OTHER BUSINESS ACTIVITIES**

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Mr. Smith is a licensed insurance agent and in such capacity, may recommend, on a fully-disclosed commission basis, the purchase of certain insurance products. When such recommendations or sales are made, a conflict of interest exists as Mr. Smith may earn an insurance commission for the sale of those products, which may create an incentive to recommend such products. Clients are under no obligation to purchase insurance products from Mr. Smith.

Connor Pierce Smith is a staff-level employee of Arbuckle-Phayer Accounting Group, LLC in Lancaster, OH. From time to time, he will meet with clients and offer wealth management and financial planning advice to company clients. He does not receive additional compensation outside of his fixed salary from Arbuckle-Phayer for any recommendation made to clients.

## **ITEM 5. ADDITIONAL COMPENSATION**

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We have nothing to disclose in this regard.

## **ITEM 6. SUPERVISION**

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Jack Barker, Chief Compliance Officer, supervises and monitors Mr. Smith's activities on a regular basis to ensure compliance with our firm's Code of Ethics. Please contact Mr. Barker if you have any questions about Mr. Smith's brochure supplement at 480-253-4102.

**ITEM 1: COVER PAGE FOR PART 2B OF FORM ADV:  
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**DATED: MARCH 2024**

**HANNAH ROSE CHAPMAN**

**JUNCTURE WEALTH STRATEGIES, LLC  
8777 E VIA DE VENTURA, SUITE 120  
SCOTTSDALE, AZ 85258  
P: (480) 253-4100**

**FIRM CONTACT:  
JACK BARKER,  
CHIEF COMPLIANCE OFFICER**

**FIRM WEBSITE ADDRESS:  
[WWW.JUNCTUREWEALTH.COM](http://WWW.JUNCTUREWEALTH.COM)**

This brochure supplement provides information about Ms. Chapman that supplements our brochure. You should have received a copy of that brochure. Please contact Jack Barker, Chief Compliance Officer, if you did not receive our firm's brochure or if you have any questions about the contents of this supplement.

Additional information about Hannah Chapman is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching CRD #5412965.

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## ITEM 2. EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

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### **Hannah Chapman**

**Year of Birth:** 1984

**Formal Education:**

- Northern Arizona University – 2006, B.M. in Flute Performance

**Business Background (for the past 5 years):**

- Juncture Wealth Strategies, LLC, dba X2WealthPlanning, LLC: Investment Advisor Representative, 01/2021 – Present
- Expansive CEO, LLC: Managing Member, 09/2022 - Present
- Ameriprise Financial Services, LLC – Investment Advisor Rep., 01/2018 – 01/2021
- Ameriprise Financial Services, LLC – Registered Representative, 11/2017 – 01/2021
- Further Financial Group (Ameriprise franchisee), unlicensed, 01/2013 – 11/2017

**Exams, Licenses and Other Professional Designations:**

- 11/2017 – General Securities Representative Examination (Series 7)
- 11/2017 - Uniform Combined State Law Examination (Series 66)
- 10/2018 – Securities Essential Examination (SIE)

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## ITEM 3. DISCIPLINARY INFORMATION

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We have nothing to disclose in this regard.

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## ITEM 4. OTHER BUSINESS ACTIVITIES

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Ms. Chapman is a licensed insurance agent and in such capacity, may recommend, on a fully-disclosed commission basis, the purchase of certain insurance products. When such recommendations or sales are made, a conflict of interest exists as Ms. Chapman may earn an insurance commission for the sale of those products, which may create an incentive to recommend such products. Clients are under no obligation to purchase insurance products from Ms. Chapman.

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## ITEM 5. ADDITIONAL COMPENSATION

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We have nothing to disclose in this regard.

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## ITEM 6. SUPERVISION

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Jack Barker, Chief Compliance Officer of Juncture Wealth Advisors supervises and monitors Ms. Chapman's activities on a regular basis to ensure compliance with our firm's Code of Ethics. Please contact Mr. Barker if you have any questions about Ms. Chapman's brochure supplement at 480-253-4100.



**ITEM 1: COVER PAGE FOR PART 2B OF FORM ADV:  
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**DATED: MARCH 2024**

**JANA LAVANWAY**

**JUNCTURE WEALTH STRATEGIES, LLC  
8777 E VIA DE VENTURA, SUITE 120  
SCOTTSDALE, AZ 85258  
P: (480) 253-4100**

**FIRM CONTACT:  
JACK BARKER,  
CHIEF COMPLIANCE OFFICER**

**FIRM WEBSITE ADDRESS:  
[WWW.JUNCTUREWEALTH.COM](http://WWW.JUNCTUREWEALTH.COM)**

This brochure supplement provides information about Ms. LaVanway that supplements our brochure. You should have received a copy of that brochure. Please contact Jack Barker, Chief Compliance Officer, if you did not receive our firm's brochure or if you have any questions about the contents of this supplement.

Additional information about Jana LaVanway is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching CRD #5590378.

## **ITEM 2. EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE**

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### **Jana LaVanway**

**Year of Birth:** 1962

**Formal Education:**

- Miami University, 1980 - 1984, BA, Communications

**Business Background (for the past 5 years):**

- Juncture Wealth Strategies, LLC: Investment Advisor Representative 2020 – Present
- Fidelity Personal & Workplace Advisors: Investment Advisor Representative, 2018 – 2020
- Fidelity Brokerage Services, LLC: Registered Rep, 2012 – 2020
- Strategic Advisers, LLC: Investment Advisor Representative, 2013 - 2018

**Exams, Licenses and Other Professional Designations:**

- 2012 - Uniform Combined State Law Examination (Series 66)

## **ITEM 3. DISCIPLINARY INFORMATION**

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We have nothing to disclose in this regard.

## **ITEM 4. OTHER BUSINESS ACTIVITIES**

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Ms. LaVanway is a licensed insurance agent and in such capacity, may recommend, on a fully-disclosed commission basis, the purchase of certain insurance products. When such recommendations or sales are made, a conflict of interest exists as Ms. LaVanway may earn an insurance commission for the sale of those products, which may create an incentive to recommend such products. Clients are under no obligation to purchase insurance products from Ms. LaVanway.

## **ITEM 5. ADDITIONAL COMPENSATION**

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We have nothing to disclose in this regard.

## **ITEM 6. SUPERVISION**

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Jack Barker, Chief Compliance Officer, supervises and monitors Ms. LaVanway's activities on a regular basis to ensure compliance with our firm's Code of Ethics. Please contact Ms. Barker if you have any questions about Ms. LaVanway's brochure supplement at 480-253-4102.

**ITEM 1: COVER PAGE FOR PART 2B OF FORM ADV:  
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**DATED: MARCH 2024**

**HENRY WONG**

**JUNCTURE WEALTH STRATEGIES, LLC  
8777 E VIA DE VENTURA, SUITE 120  
SCOTTSDALE, AZ 85258  
P: (480) 253-4100**

**FIRM CONTACT:  
JACK BARKER,  
CHIEF COMPLIANCE OFFICER**

**FIRM WEBSITE ADDRESS:  
[WWW.JUNCTUREWEALTH.COM](http://WWW.JUNCTUREWEALTH.COM)**

This brochure supplement provides information about Mr. Wong that supplements our brochure. You should have received a copy of that brochure. Please contact Jack Barker, Chief Compliance Officer, if you did not receive our firm's brochure or if you have any questions about the contents of this supplement.

Additional information about Henry Wong is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching CRD #6242344.

## **ITEM 2. EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE**

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### **Henry Wong**

**Year of Birth:** 1983

**Formal Education:**

University of Arizona – 2013, B.S. in Business Economics

**Business Background (for the past 5 years):**

- Juncture Wealth Strategies, LLC: Investment Advisor Representative 09/2021 – Present
- Juncture Wealth Advisors, LLC: Investment Advisor Representative, 10/2020 – 09/2021
- United Planners' Financial Services of America, LP; Registered Rep, 10/2020 – 09/2021
- Centaurus Financial, Inc: Registered Representative, 01/2014 – 10/2020
- Catalina Investments: Office Assistant, 09/2013 – 10/2020
- Wells Fargo Bank; Business Banker, 02/2011 - 08/2013

**Exams, Licenses and Other Professional Designations:**

- 2015 – General Securities Representative Examination (Series 7)
- 2016 - Uniform Combined State Law Examination (Series 66)
- 2018 – Securities Essential Examination (SIE)

## **ITEM 3. DISCIPLINARY INFORMATION**

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We have nothing to disclose in this regard.

## **ITEM 4. OTHER BUSINESS ACTIVITIES**

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Mr. Wong is a licensed insurance agent and in such capacity, may recommend, on a fully-disclosed commission basis, the purchase of certain insurance products. When such recommendations or sales are made, a conflict of interest exists as Mr. Wong may earn an insurance commission for the sale of those products, which may create an incentive to recommend such products. Clients are under no obligation to purchase insurance products from Mr. Wong.

## **ITEM 5. ADDITIONAL COMPENSATION**

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We have nothing to disclose in this regard.

## **ITEM 6. SUPERVISION**

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Jack Barker, Chief Compliance Officer, supervises and monitors Mr. Wong's activities on a regular basis to ensure compliance with our firm's Code of Ethics. Please contact Ms. Barker if you have any questions about Mr. Wong's brochure supplement at 480-253-4102.