

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

DATED: MARCH 2026

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**

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 by searching CRD #2801533.

ITEM 2. EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

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

We have nothing to disclose in this regard.

ITEM 4. OTHER BUSINESS ACTIVITIES

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

We have nothing to disclose in this regard.

ITEM 6. SUPERVISION

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

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DATED: MARCH 2026

JACK A. BARKER

**JUNCTURE WEALTH STRATEGIES, LLC
8777 E. VIA DE VENTURA, SUITE 120
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**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 by searching CRD#: 2570575.

ITEM 2. EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

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.

Mr. Barker 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. Barker 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. Barker.

ITEM 3. DISCIPLINARY INFORMATION

We have nothing to disclose in this regard.

ITEM 4. OTHER BUSINESS ACTIVITIES

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

ITEM 5. ADDITIONAL COMPENSATION

We have nothing to disclose in this regard.

ITEM 6. SUPERVISION

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 2026

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**

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 by searching CRD #2571132.

ITEM 2. EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

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

We have nothing to disclose in this regard.

ITEM 4. OTHER BUSINESS ACTIVITIES

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

ITEM 5. ADDITIONAL COMPENSATION

We have nothing to disclose in this regard.

ITEM 6. SUPERVISION

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 2026

WANDA STAPLEY

**JUNCTURE WEALTH STRATEGIES, LLC
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SCOTTSDALE, AZ 85258
P: (480) 253-4100**

**FIRM CONTACT:
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**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 by searching CRD#: 1872814.

ITEM 2. EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

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

We have nothing to disclose in this regard.

ITEM 4. OTHER BUSINESS ACTIVITIES

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

We have nothing to disclose in this regard.

ITEM 6. SUPERVISION

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 2026

CONNOR PIERCE SMITH

**JUNCTURE WEALTH STRATEGIES, LLC
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SCOTTSDALE, AZ 85258
P: (480) 253-4100**

**FIRM CONTACT:
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**FIRM WEBSITE ADDRESS:
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 by searching CRD #6539351.

ITEM 2. EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

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

We have nothing to disclose in this regard.

ITEM 4. OTHER BUSINESS ACTIVITIES

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.

ITEM 5. ADDITIONAL COMPENSATION

We have nothing to disclose in this regard.

ITEM 6. SUPERVISION

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.

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DATED: MARCH 2026

HANNAH ROSE CHAPMAN

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

**FIRM CONTACT:
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**FIRM WEBSITE ADDRESS:
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 by searching CRD #5412965.

ITEM 2. EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

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)

ITEM 3. DISCIPLINARY INFORMATION

We have nothing to disclose in this regard.

ITEM 4. OTHER BUSINESS ACTIVITIES

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.

ITEM 5. ADDITIONAL COMPENSATION

We have nothing to disclose in this regard.

ITEM 6. SUPERVISION

Jack Barker, Chief Compliance Officer, 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.

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DATED: MARCH 2026

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**

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 by searching CRD #5590378.

ITEM 2. EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

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

We have nothing to disclose in this regard.

ITEM 4. OTHER BUSINESS ACTIVITIES

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

We have nothing to disclose in this regard.

ITEM 6. SUPERVISION

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.

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DATED: MARCH 2026

HENRY WONG

**JUNCTURE WEALTH STRATEGIES, LLC
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SCOTTSDALE, AZ 85258
P: (480) 253-4100**

**FIRM CONTACT:
JACK BARKER,
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**FIRM WEBSITE ADDRESS:
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 by searching CRD #6242344.

ITEM 2. EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

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

We have nothing to disclose in this regard.

ITEM 4. OTHER BUSINESS ACTIVITIES

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

We have nothing to disclose in this regard.

ITEM 6. SUPERVISION

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.

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DATED: MARCH 2026

ALLISON GRAHAM SPANGLER

**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**

This brochure supplement provides information about Ms. Spangler 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 Allison Spangler is available on the SEC's website at www.adviserinfo.sec.gov by searching CRD #5535838.

ITEM 2. EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Allison Spangler

Year of Birth: 1978

Formal Education:

- Mississippi College – 2002, Master of Science in Communication
- University of Mississippi – 2001, Bachelor of Business Administration

Business Background (for the past 5 years):

- Juncture Wealth Strategies, LLC: Senior Wealth Advisor, 09/2024 – Present
- Raymond James Financial Services; Investment Advisor Representative 01/2009 – 09/2024
- Raymond James Financial Services; Registered Representative, 10/2008 – 09/2024

Exams, Licenses and Other Professional Designations:

- 2022 Chartered Retirement Planning Counselor (CRPC)
- 2021 Uniform Combined State Law Examination (series 66)
- 2015 Uniform Securities Agent State Law Examination (series 63)

ITEM 3. DISCIPLINARY INFORMATION

We have nothing to disclose in this regard.

ITEM 4. OTHER BUSINESS ACTIVITIES

Ms. Spangler 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. Spangler 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. Spangler.

Ms. Spangler is a Chartered Retirement Planning Counselor or CRPC® professional. The College for Financial Planning awards the Chartered Retirement Planning Counselor or CRPC® designation to individuals who successfully complete a course of study encompassing pre- and post-retirement needs, asset management, estate planning and the entire retirement planning process using models and techniques from real client situations. Individuals are required to pass an online, timed and proctored end-of-course examination with a 70% score or higher. The examination tests the individual's ability to relate complex concepts and apply theoretical concepts to real-life situations. Authorization for continued use of the credential must be renewed every two years by completing 16

hours of continuing education and reaffirming compliance with the College of Financial Planning's standards of professional conduct and terms and conditions, among other things.

ITEM 5. ADDITIONAL COMPENSATION

We have nothing to disclose in this regard.

ITEM 6. SUPERVISION

Jack Barker, Chief Compliance Officer, supervises and monitors Ms. Spangler'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. Spangler's brochure supplement at 480-253-4102.

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DATED: APRIL 2026

DANIEL EVAN OWENS

**JUNCTURE WEALTH STRATEGIES, LLC
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SCOTTSDALE, AZ 85258
PHONE: 480.253.4100**

**FIRM CONTACT:
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This brochure supplement provides information about Mr. Owens 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 Daniel Owens is available on the SEC's website at www.adviserinfo.sec.gov by searching CRD #4695142.

ITEM 2. EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Daniel Owens

Year of Birth: 1978

Formal Education:

- Doane, College – 2000, Bachelor of Business Administration

Business Background (for the past 5 years):

- Juncture Wealth Strategies, LLC: Managing Member, 2026 – Present
- Elk River Wealth Management, LLC – Investment Advisor Rep., 04/2020 – 04/2026

Exams, Licenses and Other Professional Designations:

- 2013 Certified Private Wealth Advisor (CPWA®)

ITEM 3. DISCIPLINARY INFORMATION

We have nothing to disclose in this regard.

ITEM 4. OTHER BUSINESS ACTIVITIES

Mr. Owens 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. Owens 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. Spangler.

Mr. Owens is a Certified Private Wealth Advisor (CPWA), a designation offered by the Investments & Wealth Institute for professionals working with high net worth clients (\$5 million and above) in the areas of wealth management, estate planning, wealth transfer, tax management, and legacy planning. The designation requires 5 years of verified experience, classroom education program, a 4-hour exam, and 40 hours of continuing education (including ethics) every two years.

ITEM 5. ADDITIONAL COMPENSATION

We have nothing to disclose in this regard.

ITEM 6. SUPERVISION

Jack Barker, Chief Compliance Officer, supervises and monitors Mr. Owens' 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. Owens' brochure supplement at 480-253-4102.