



Form ADV Part 2B – Brochure Supplement
for

Theodore M Jenkin,
CFP®, CRPC®, CRPS®, AWMA®, AAMS®, CMFC®, CEPA®
Chief Executive Officer

Effective: September 17, 2026

This Form ADV 2B ("Brochure Supplement") provides information about the background and qualifications of Theodore M. Jenkin (CRD# 2169338) in addition to the information contained in the Exit Wealth Advisors, LLC ("EWA" or the "Advisor", CRD# 332573) Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of the EWA Disclosure Brochure or this Brochure Supplement, please contact us at 404-474-8513.

Additional information about Mr. Jenkin is available on the SEC's Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching with his full name or his Individual CRD# 2169338.

Exit Wealth Advisors, LLC

1266 West Paces Ferry Road,
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Item 2 – Educational Background and Business Experience

Theodore “Ted” M. Jenkin, born in 1969, is dedicated to advising Clients of EWA as the Chief Marketing Officer. Mr. Jenkin earned a Bachelor of Science from Boston College in 1991. Additional information regarding Mr. Jenkin’s employment history is included below.

Employment History:

Chief Executive Officer, Exit Wealth Advisors, LLC.	09/2026 to Present
Chief Marketing Officer, Exit Wealth Advisors, LLC.	08/2024 to 09/2026
President, Exit Stage Left Advisors, LLC.	01/2023 to Present
Managing Partner, JPTD Partners	07/2024 to Present
Consultant, oXYGen Financial Inc.	08/2008 to Present
Adviser, Kestra Advisory Services, LLC.	05/2016 to 05/2023
Adviser, NFP Advisor Services, LLC.	09/2015 to 09/2016
Adviser, Investacorp Advisory Services, LLC.	09/2008 to 09/2015

Professional Designations

CERTIFIED FINANCIAL PLANNER™

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

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

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

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

- Ethics – Commit to complying with CFP Board’s Code and Standards. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning. CFP Board may sanction a

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CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.

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

Chartered Retirement Planning Counselor (CRPC™)

Individuals who hold the CRPC™ designation have completed 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. Additionally, individuals must pass an end-of course examination that tests their ability to synthesize complex concepts and apply theoretical concepts to real-life situations. All designees have agreed to adhere to Standards of Professional Conduct and are subject to a disciplinary process. Designees renew their designation every two-years by completing 16 hours of continuing education, reaffirming adherence to the Standards of Professional Conduct and complying with self-disclosure requirements.

Chartered Retirement Plans Specialist (CRPS®)

The College of Financial Planning® awards the CRPS® designation to applicants who complete the CRPS® professional education program, pass a final examination, commit to a code of ethics and agree to pursue continuing education. Continued use of the CRPS® designation is subject to ongoing renewal requirements. Every two years the designee must renew their right to continue using the CRPS® designation by completing 16 hours of continuing education and reaffirming to abide by the Standards of Professional Conduct.

Accredited Wealth Management Advisor, AWMA®

Individuals who hold the AWMA designation have completed a course of study encompassing the needs of high-net-worth clients as well as behavioral finance, working with small business owners, and succession/exit planning. Additionally, individuals must pass an end-of-course examination, on-lined and timed. All designees have agreed to adhere to Standards of Professional Conduct and are subject to a disciplinary process. Designees renew their designation every two-years by completing 16 hours of continuing education, reaffirming adherence to the Standards of Professional Conduct and complying with self-disclosure requirements.

Accredited Asset Management Specialist, AAMS®

Individuals who hold the AAMS® designation have completed a course of study encompassing investments, insurance, tax, retirement, and estate planning issues. Additionally, individuals must pass an end-of-course examination that tests their ability to synthesize complex concepts and apply theoretical concepts to real-life situations. All designees have agreed to adhere to Standards of Professional Conduct and are subject to a disciplinary process. Designees renew their designation every two-years by completing 16 hours of continuing education, reaffirming adherence to the Standards of Professional Conduct and complying with self-disclosure requirements.

Chartered Mutual Fund Counselor (CMFC™)

The CMFC designation is granted by the College for Financial Planning in collaboration with the Investment Company Institute (ICI) and is the only industry-recognized mutual fund designation. This designation requires a thorough knowledge of mutual funds and their various uses as investment vehicles. To obtain the designation, individuals must successfully complete a course of study in open and closed-end mutual funds, risk and return assessment, asset allocation, mutual fund selection for a client, retirement planning, and ethics and professional conduct. They must also comply with the Code of Ethics, which includes agreeing to abide by the Standards of Professional Conduct and Terms and Conditions. The designation must be renewed every two years by completing 16 hours of continuing education and reaffirming the Code of Ethics. For more information on the CMFC designation, go to the College for Financial Planning website, www.cffp.edu.

Certified Exit Planning Advisor® (CEPA®)

Certified Exit Planning Advisor® (“CEPA®”) designation. The CEPA® designation is granted by the Exit Planning Institute® (“EPI”) to financial professionals who complete a prescribed educational program focused on exit planning strategies for business owners.

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The CEPA® program covers topics including, but not limited to:

- Business value enhancement
- Exit planning strategies
- Business continuity considerations
- Coordination among professional advisors (e.g., legal, tax, financial)

To obtain the CEPA® designation, candidates must complete required coursework and pass an examination administered by the Exit Planning Institute®. Designees are required to adhere to EPI's professional conduct standards and complete continuing education requirements to maintain the designation.

The CEPA® designation does not require specific experience levels, does not confer authority to provide legal or tax advice, and does not transform the holder into a specialist or expert in any one discipline. Exit planning services may require coordination with independent legal, tax, or valuation professionals, and clients are encouraged to consult appropriate professionals regarding their specific circumstances.

Item 3 – Disciplinary Information

There are no legal, civil or disciplinary events to disclose regarding Mr. Jenkins. However, Mr. Jenkin has been involved in regulatory, civil or criminal action in the past, which do not need to be disclosed in the ADV Part 2B. However, we do encourage you to independently view the disclosures, which can be seen on the SEC's Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching with his full name or his Individual CRD# 2169338.

Securities laws require an advisor to disclose any instances where the advisor or its advisory persons have been found liable in a legal, regulatory, civil or arbitration matter that alleges violation of securities and other statutes; fraud; false statements or omissions; theft, embezzlement or wrongful taking of property; bribery, forgery, counterfeiting, or extortion; and/or dishonest, unfair or unethical practices. ***There are no legal, civil or disciplinary events to disclose regarding Mr. Jenkin.***

However, we do encourage you to independently view the background of Mr. Jenkin on the Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching with his full name or his Individual CRD# 332573.

Item 4 – Other Business Activities

Insurance Agency Affiliations

Mr. Jenkin is also a licensed insurance professional. Implementations of insurance recommendations are separate and apart from Mr. Jenkin's role with EWA. As an insurance professional, Mr. Jenkin will receive customary commissions and other related revenues from the various insurance companies whose products are sold. Mr. Jenkin is not required to offer the products of any particular insurance company. Commissions generated by insurance sales do not offset regular advisory fees. This practice presents a conflict of interest in recommending certain products of the insurance companies. Clients are under no obligation to implement any recommendations made by Mr. Jenkin or the Advisor. Mr. Jenkin spends approximately 5% of his time per month in this capacity.

Item 5 – Additional Compensation

Mr. Jenkin has additional business activities where compensation is received that are detailed in Item 4 above.

Item 6 – Supervision

Mr. Jenkin is supervised by the Chief Compliance Officer, Kevin Kim, who can be reached at 513-977-8615

EWA has implemented a Code of Ethics, an internal compliance document that guides each Supervised Person in meeting their fiduciary obligations to Clients of EWA. Further, EWA is subject to regulatory oversight by various agencies. These agencies require registration by EWA and its Supervised Persons. As a registered entity, EWA is subject to examinations by regulators, which may be announced or unannounced. EWA is required to periodically

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update the information provided to these agencies and to provide various reports regarding the business activities and assets of the Advisor.



Form ADV Part 2B – Brochure Supplement

for

**Matthew A. Goldenstein,
Chief Investment Officer**

Effective: March 24, 2026

This Form ADV 2B ("Brochure Supplement") provides information about the background and qualifications of Matthew A. Goldstein (CRD# 2637415) in addition to the information contained in the Exit Wealth Advisors, LLC ("EWA" or the "Advisor", CRD# 332573) Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of the EWA Disclosure Brochure or this Brochure Supplement, please contact us at 404-474-8513.

Additional information about Mr. Goldstein is available on the SEC's Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching with his full name or his Individual CRD# 2637415.

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Item 2 – Educational Background and Business Experience

Matthew “Matt” A. Goldstein, born in 1973, is dedicated to advising Clients of EWA as the Chief Investment Officer. Mr. Goldstein earned a Bachelor of Science in Finance from Florida State University in 1995. Additional information regarding Mr. Goldstein’s employment history is included below.

Employment History:

Chief Investment Officer, Exit Wealth Advisors, LLC.	05/2025 to Present
Adviser/Registered Representative, Kestra Advisory Services, LLC.	03/2021 to 04/2025
Adviser, US Bancorp Investments, Inc.	03/2012 to 03/2021
Branch Manager, Ameriprise Financial Services, Inc.	01/2011 to 03/2012

Professional Designations

Mr. Goldstein has no additional professional designations to report.

Item 3 – Disciplinary Information

There are no legal, civil or disciplinary events to disclose regarding Mr. Goldstein. Mr. Goldstein has never been involved in any regulatory, civil or criminal action that were deemed reportable. There have been no client complaints, lawsuits, arbitration claims or administrative proceedings that are reportable against Mr. Goldstein.

Securities laws require an advisor to disclose any instances where the advisor or its advisory persons have been found liable in a legal, regulatory, civil or arbitration matter that alleges violation of securities and other statutes; fraud; false statements or omissions; theft, embezzlement or wrongful taking of property; bribery, forgery, counterfeiting, or extortion; and/or dishonest, unfair or unethical practices. ***As previously noted, there are no legal, civil or disciplinary events to disclose regarding Mr. Goldstein***

However, we do encourage you to independently view the background of Mr. Goldstein on the Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching with his full name or his Individual CRD# 2637415.

Item 4 – Other Business Activities

Insurance Agency Affiliations

Mr. Goldstein is also a licensed insurance professional. Implementations of insurance recommendations are separate and apart from Mr. Goldstein’s role with EWA. As an insurance professional, Mr. Goldstein will receive customary commissions and other related revenues from the various insurance companies whose products are sold. Mr. Goldstein is not required to offer the products of any particular insurance company. Commissions generated by insurance sales do not offset regular advisory fees. This practice presents a conflict of interest in recommending certain products of the insurance companies. Clients are under no obligation to implement any recommendations made by Mr. Goldstein or the Advisor. Mr. Goldstein spends approximately 5% of his time per month in this capacity.

Item 5 – Additional Compensation

Mr. Goldstein has additional business activities where compensation is received that are detailed in Item 4 above.

Item 6 – Supervision

Mr. Goldstein is supervised by the Chief Compliance Officer, Kevin Kim, who can be reached at 513-977-8615

EWA has implemented a Code of Ethics, an internal compliance document that guides each Supervised Person in meeting their fiduciary obligations to Clients of EWA. Further, EWA is subject to regulatory oversight by various agencies. These agencies require registration by EWA and its Supervised Persons. As a registered entity, EWA is subject to examinations by regulators, which may be announced or unannounced. EWA is required to periodically

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update the information provided to these agencies and to provide various reports regarding the business activities and assets of the Advisor.