

WCG Wealth Advisors, LLC

Doing Business As: Life Strategy Financial & The Wealth Consulting Group

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01/05/2026

This brochure supplement provides information about Juan Munoz that supplements the WCG Wealth Advisors, LLC disclosure brochure. You should have received a copy of that brochure that describes the investment advisory services offered through WCG Wealth Advisors, LLC, an investment advisor firm. Please contact WCG Wealth Advisors, LLC at the telephone number above if you did not receive their brochure or if you have any questions about the contents of the supplement.

Additional information about Juan Munoz is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 - Educational Background and Business Experience

This section of the brochure supplement includes the supervised person's name, age (or year of birth), formal education after high school, and business background (including an identification of the specific positions held) for the preceding five years.

Juan Munoz

Year of birth: 1978

Education

The following information details your Financial Advisor's formal education. If a degree was attained, the type of the degree will be listed next to the name of the institution. If a degree is not listed, the Financial Advisor attended the institution but did not attain a degree.

Texas Tech University; Bachelor in Science - Personal Financial Planning
01/2006 – 05/2008

Business Experience

The following information details your Financial Advisor's business experience for at least the past 5 years.

WCG Wealth Advisors, LLC; Investment Advisor Representative
01/2026 – Present

Capital Asset Advisory Service; Investment Advisor Representative
06/2019 – 01/2026

Professional Designations

The following provides information on professional designation(s) that your Financial Advisor earned.

Certified Financial Planner™ - CFP® CFP Board

Designation: Certified Financial Planner (CFP®). Issuing Organization: Certified Financial Planner Board of Standards, Inc. (CFPBS). Prerequisites/Experience Required: Must have a bachelor's degree (or higher) from an accredited college or university, and three years of full-time personal financial planning experience. Educational Requirements: Must complete a CFP®-board registered program or hold another designation authorized by the CFPBS. Continuing Education: 30 hours every two years.

Accredited Investment Fiduciary - AIF®

Designation: Accredited Investment Fiduciary (AIF®). Issuing Organization: Center for Fiduciary Studies. Prerequisites/Experience Required: Must meet a point-based threshold based on a combination of education, relevant industry experience and/or professional development. Educational Requirements: Must complete either a Web-based program or Capstone program. Continuing Education: 6 hours per year.

Certified Retirement Counselor - CRC®

Designation: Certified Retirement Counselor (CRC®). Issuing Organization: International Foundation for Retirement Education (InFRE). Prerequisites/Experience Required: Candidates must*: have a bachelors degree of equivalent and a minimum of two years of relevant professional experience within the past five years **or** have a high school diploma or equivalent

and five years of relevant professional experience within the past seven years. *Candidates who pass the designation exam but have not met their education and experience requirements have five years from their exam date to complete these requirements. Educational Requirements: Proctored, in-person certification exam. Continuing Education: 15 credit hours annually, including at least two hours of ethics every two years.

Accredited Asset Management Specialist - AAMS®

Designation: Accredited Asset Management Specialist (AAMS®). Issuing Organization: College for Financial Planning – a Kaplan Company. Prerequisites/Experience Required: None. Educational Requirements: Online self-study AAMS course and exam to be completed within 120 days of receiving program access; instructor-led option based on availability. Continuing Education: 16 hours every two years.

Item 3 - Disciplinary Information

This section includes any legal or disciplinary events and material to a client's or prospective client's evaluation of the supervised person.

Your financial advisor has no legal or disciplinary events required to be disclosed in response to this item. There may be items that are contained on brokercheck.finra.org or www.adviserinfo.sec.gov that you may wish to review and consider in your evaluation of your advisor's background.

Item 4 - Other Business Activities

This section includes any relationship between the advisory business and the supervised person's other financial industry activities that creates a material conflict of interest with clients and describes the nature of the conflict and generally how it is addressed. If the supervised person is actively engaged in any investment-related business or occupation, including if the supervised person is registered, or has an application pending to register, as a broker-dealer, registered representative of a broker-dealer, futures commission merchant ("FCM"), commodity pool operator ("CPO"), commodity trading advisor ("CTA"), or an associated person of an FCM, CPO, or CTA, the business relationship, if any, between the advisory business and the other business is disclosed below.

Other Business Activities: Life Strategy Financial & The Wealth Consulting Group/DBA for Advisory Business.

Life Strategy Financial and The Wealth Consulting Group, operating as two separate DBAs for Advisory business.

Item 5 - Additional Compensation

This section includes details regarding if someone who is not a client provides an economic benefit to the supervised person for providing advisory services. For purposes of this Item, economic benefits include sales awards and other prizes, but not the supervised person's regular salary, if any.

Your financial advisor can receive economic benefits from persons other than clients in connection with advisory services. Your financial advisor provides services in an Asset Management account and may recommend mutual funds. Only no-load and load-waived mutual funds are available to be purchased in such asset management accounts.

However, some of these mutual funds may pay distribution or service fees (e.g., 12b-1 fees) payable to LPL Financial. However, when your financial advisor provides investment advisory services, it is as a fiduciary under the Investment Advisers Act and has a duty to act in your best interest and to make full and fair disclosure to you of all material facts and conflicts of interest.

Your financial advisor can receive compensation from product sponsors and certain third-party vendors. Compensation may include such items as gifts valued at less than \$100 annually, an occasional dinner or ticket to a sporting event, or reimbursement in connection with educational or training events or marketing or advertising initiatives. Such compensation may not be tied to the sale of any products.

Your financial advisor acts as a (referral agent to, or engages as a co-advisor) with, certain third-party asset management firms (TAMPs). In such case, he or she receives compensation from the TAMP either in the form of a referral payment or an advisory fee, and you are provided disclosure about the arrangement and the compensation to be received at the time of the referral or engagement. Your financial advisor may also receive compensation in addition to a referral or advisory fee. For example, some TAMPs pay or reimburse financial advisors for attending conferences or for expenses for workshops, seminars presented to clients, or advertising, marketing, or practice management. The eligibility of a financial advisor to receive such payments or reimbursements is often based on the number/amount of assets referred by the financial advisor to the TAMP.

Item 6 - Supervision

This section explains how the firm supervises the supervised persons, including how the advice the supervised person provided to clients is monitored.

Jimmy Lee is the CEO of WCG Wealth Advisors, LLC. He is responsible for all activities of the firm, however, the compliance activities are monitored by the Chief Compliance Officer ("CCO") and the Compliance Department. Compliance staff uses tools that monitor the advisory services provided by your financial advisor, for example, with respect to asset allocation, concentration, and account activity where additional scrutiny or analysis may be appropriate. If you have any concerns, please contact Rosemary Richard (CCO) at (702) 263-8379 or by email at compliance@wealthcg.com.