

BROCHURE SUPPLEMENT

July 29, 2025

This brochure supplement provides information about Alaina Pogreba that supplements the Avior Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Veronica LeDuc if you did not receive the Avior Wealth Management, LLC brochure or if you have any questions about the contents of this supplement.

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

Alaina Pogreba

Avior Wealth Management, LLC
14301 FNB Pkwy, Suite 410
Omaha, NE 68154
Phone: (402) 218-4064

Educational Background and Business Experience

Alaina Pogreba graduated from the University of Nebraska with a Bachelor's Degree of Science in Business Administration with a concentration in Banking and Financial Markets, Business Finance and Investment Science and Portfolio Management.

Disciplinary Information

Alaina Pogreba has no disciplinary history that is required to be disclosed by the U.S. Securities and Exchange Commission or state regulatory authorities.

Other Business Activities

Miss Pogreba spends all her work week on advisory matters.

Additional Compensation

Alaina Pogreba does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Supervision

Alaina Pogreba is a member of Avior Wealth Management, LLC. Veronica LeDuc, the Chief Compliance Officer, is responsible for developing, overseeing, and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives, including Miss Pogreba. They may both be contacted at (402) 218-4064.

Professional Designation Information

The Certified Financial Planner™ (CFP®) designation is issued by the Certified Financial Planner Board of Standards, Inc. It is a voluntary certification recognized by the United States and other countries for its (1) high standard of professional education, (2) stringent code of conduct and standards of practice and (3) ethical requirements governing professional engagements with clients. A candidate for designation must first obtain a bachelor's degree from an accredited college or university with courses that included financial planning subject areas (e.g., insurance planning, risk management, employee benefits planning, investment planning, income tax planning, retirement planning and estate planning). Candidates must also have at least 3 years of full-time personal financial planning experience, measured as 2,000 hours per year. CFP® candidates must pass a 2-day comprehensive examination designed to test their ability to correctly diagnose financial planning issues and apply their knowledge to real world circumstances. Candidates must also agree to be bound by the Certified Financial Planner Board's Standards of Professional Conduct. Anyone earning designation as a CFP® must complete 30 hours of continuing education every two years and renew the agreement to be bound by the Standards of Professional Conduct.

BROCHURE SUPPLEMENT

March 16, 2026

This brochure supplement provides information about Alek Sokoloski that supplements the Avior Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Veronica LeDuc if you did not receive the Avior Wealth Management, LLC brochure or if you have any questions about the contents of this supplement.

Additional information about Alek Sokoloski (CRD # 7276764) is available on the SEC's website at

www.adviserinfo.sec.gov.

Alek Sokoloski, CFP®

Avior Wealth Management, LLC

14648 N, Scottsdale Rd., Suite 300

Scottsdale, Arizona 85254

Phone: (480) 582-1910

Educational Background and Business Experience

Alek Sokoloski was born in 2000. Mr. Sokoloski graduated from Temple University, with a Bachelor's Degree in Financial Planning. In 2024, Mr. Sokoloski has attained the designation as a CERTIFIED FINANCIAL PLANNER™ (CFP®).

Mr. Sokoloski has been a member and an Investment Advisor Representative of Avior Wealth Management, LLC since March 2026. Before joining Avior Wealth Management, he was employed as an Associate of Ironwood Investment Counsel.

Disciplinary Information

Alek Sokoloski has no disciplinary history that is required to be disclosed by the U.S. Securities and Exchange Commission or state regulatory authorities.

Other Business Activities

Alek Sokoloski spends all of his work week on advisory matters.

Additional Compensation

Alek Sokoloski does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Supervision

Alek Sokoloski is a member of Avior Wealth Management, LLC. Veronica LeDuc, the Chief Compliance Officer, is responsible for developing, overseeing, and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives, including Mr. Sokoloski. They may both be contacted at (402) 218-4064.

Professional Designation Disclosure

The Certified Financial Planner™ (CFP®) designation is issued by the Certified Financial Planner Board of Standards, Inc. It is a voluntary certification recognized by the United States and other countries for its (1) high standard of professional education, (2) stringent code of conduct and standards of practice and (3) ethical requirements governing professional engagements with clients. A candidate for designation must first obtain a bachelor's degree from an accredited college or university with courses that included financial planning subject areas (e.g., insurance planning, risk management, employee benefits planning, investment planning, income tax planning, retirement planning and estate planning). Candidates must also have at least 3 years of full-time personal financial planning experience, measured as 2,000 hours per year. CFP® candidates must pass a 2-day comprehensive examination designed to test their ability to correctly diagnose financial planning issues and apply their knowledge to real world circumstances. Candidates must also agree to be bound by the Certified Financial Planner Board's Standards of Professional Conduct. Anyone earning designation as a CFP® must complete 30 hours of continuing education every two years and renew the agreement to be bound by the Standards of Professional Conduct.

BROCHURE SUPPLEMENT

March 26, 2025

This brochure supplement provides information about Alexander Avestini that supplements the Avior Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Veronica LeDuc if you did not receive the Avior Wealth Management, LLC brochure or if you have any questions about the contents of this supplement.

Additional information about Alexander Avestini is available on the SEC's website at

www.adviserinfo.sec.gov.

Alexander Avestini, CFP®

Avior Wealth Management, LLC

14648 N. Scottsdale Road

Suite 300

Scottsdale, Arizona 85254

(480) 582-1910

Educational Background and Business Experience

Mr. Avestini obtained his Bachelor of Finance from North Dakota State University in 2014. He has attained the designation of Certified Financial Planner (CFP®).

Before joining Avior Wealth Management, LLC., Alexander Avestini worked for PFK Management / PFK Financial Services from June 2014 through May 2022.

Disciplinary Information

Mr. Avestini has no disciplinary history that is required to be disclosed by the U.S. Securities and Exchange Commission or state regulatory authorities.

Other Business Activities

Mr. Avestini is the sole owner of Avesta Wealth Management, LLC which was used to receive income from his prior employment.

Additional Compensation

Mr. Avestini does not receive any other economic benefit from a non-advisory client for the provision of advisory services.

Supervision

Alexander Avestini is a member of Avior Wealth Management, LLC. Veronica LeDuc, the Chief Compliance Officer, is responsible for developing, overseeing and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives, including Mr. Avestini. They may both be contacted at (402) 218-4064.

Professional Designation Disclosure

¹ The Certified Financial Planner™ (CFP®) designation is issued by the Certified Financial Planner Board of Standards, Inc. It is a voluntary certification recognized by the United States and other countries for its (1) high standard of professional education, (2) stringent code of conduct and standards of practice and (3) ethical requirements governing professional engagements with clients. A candidate for designation must first obtain a bachelor's degree from an accredited college or university with courses that included financial planning subject areas (e.g., insurance planning, risk management, employee benefits planning, investment planning, income tax planning, retirement planning and estate planning). Candidates must also have at least 3 years of full-time personal financial planning experience, measured as 2,000 hours per year. CFP® candidates must pass a comprehensive examination designed to test their ability to correctly diagnose financial planning issues and apply their knowledge to real world circumstances. Candidates must also agree to be bound by the Certified Financial Planner Board's Standards of Professional Conduct. Anyone earning designation as a CFP® must complete 30 hours of continuing education every two years and renew the agreement to be bound by the Standards of Professional Conduct.

BROCHURE SUPPLEMENT

July 29, 2025

This brochure supplement provides information about Andrea P. McMahon that supplements the Avior Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Veronica LeDuc if you did not receive the Avior Wealth Management, LLC brochure or if you have any questions about the contents of this supplement.

Additional information about Andrea P. McMahon is available on the SEC's website at www.adviserinfo.sec.gov.

Andrea P. McMahon

Avior Wealth Management, LLC

14301 First National Bank Parkway, Suite 410

Omaha, Nebraska 68154

Phone: (402) 218-4064

Educational Background and Business Experience

Andrea P. McMahon was born in 1958 and graduated from the University of Nebraska at Omaha in 1985 with a Bachelor of Science Degree in Business Administration. She obtained designation as a Chartered Financial Analyst® in 1994 (CFA®)¹. She has been an Investment Advisor Representative with Avior Wealth Management, LLC since October 2013. Before joining Avior Wealth Management, LLC she was a Financial Advisor with Westwood Trust from October 1998 to October 2013 and a registered representative with Quasar Distributors, LLC from June 2006 to December 2010.

Disciplinary Information

Andrea P. McMahon has no disciplinary history that is required to be disclosed by the U.S. Securities and Exchange Commission or state regulatory authorities.

Other Business Activities

Ms. McMahon spends all her work week on client advisory matters and management of Avior's employees.

Additional Compensation

Andrea P. McMahon does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Supervision

Andrea McMahon is a member of Avior Wealth Management, LLC. Veronica LeDuc, the Chief Compliance Officer, is responsible for developing, overseeing, and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives, including Ms. McMahon. They may both be contacted at (402) 218-4064.

Professional Designation Information

¹ The Chartered Financial Analyst® (CFA®) designation is administered through the CFA Institute. The CFA designation signifies that an individual has met initial and on-going experience, ethical, education and examination requirements for investment management consulting, including advanced investment management theory and application. To obtain the CFA® certification, candidates must (1) successfully complete three separate levels of

proctored exams each required more than 300 hours of study per level and (2) accumulate 48 months of approved work experience. CFA® designees are required to pledge to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct, become a regular member of CFA Institute and apply for membership to a local CFA member society. CFA® designees must complete a minimum of 20 hours of continuing education activities including 2 hours in the content areas of Standards, Ethics, and Regulations (SER).

BROCHURE SUPPLEMENT

February 20, 2026

This brochure supplement provides information about Bill Richardson that supplements the Avior Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Veronica LeDuc if you did not receive the Avior Wealth Management, LLC brochure or if you have any questions about the contents of this supplement.

Additional information about Bill Richardson (CRD # 5151639) is available on the SEC's website at

www.adviserinfo.sec.gov.

Bill Richardson, CRPC

Avior Wealth Management, LLC

11100 Wayzata Blvd., Suite 210

Minnetonka, MN

Phone: (763) 542-8884

Educational Background and Business Experience

Bill Richardson was born in 1976. Mr. Richardson graduated from Luther College in 1998, with a BA in Psychology and Religion. In October 2011, Mr. Richardson attained the designation as a CRPC.

Mr. Richardson has been a member and an Investment Advisor Representative of Avior Wealth Management, LLC since February 2026. Before joining Avior Wealth Management, the predecessor to Avior, he was employed as an investment advisor representative of Sound Income Strategies from March 2023-February 2026.

Disciplinary Information

Bill Richardson has no disciplinary history that is required to be disclosed by the U.S. Securities and Exchange Commission or state regulatory authorities.

Other Business Activities

Bill Richardson is also independently licensed as an insurance agent and may sell insurance products to clients and receive commissions when doing so. This is a potential conflict of interest, since commissions earned could be in addition to advisory fees earned in his capacity as an investment advisor representative. Clients are never obligated or required to purchase insurance products from or through Bill Richardson and may select any independent insurance agent and insurance company to purchase insurance products. Regardless of the insurance agent selected, the insurance agent or agency will receive normal commissions from the sale.

Bill Richardson is licensed to sell fixed insurance products under his own name. This encompasses approximately 50% of business hours.

Mr. Richardson is a contracted Branch Manager for the Retirement Income Source and also uses this as his DBA to market to prospective clients for Investment Advisory and Fixed Insurance Services. This encompasses approximately 50% of business hours.

Additional Compensation

Bill Richardson does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Mr. Richardson may receive commissions for the sale of insurance products in his capacity as an insurance agent, but he does not receive any performance-based fees. He does not receive any additional benefit from third parties for providing investment advisory services.

Supervision

Bill Richardson is a member of Avior Wealth Management, LLC. Veronica LeDuc, the Chief Compliance Officer, is responsible for developing, overseeing, and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives, including Mr. Richardson. They may both be contacted at (402) 218-4064.

Professional Designation Disclosure

Designation: CRPC® Chartered Retirement Planning Counselor – 10/2011

The CRPC® Chartered Retirement Planning Counselor designation is awarded after completion of a program that focuses on the pre-and post-retirement needs of individuals. The College for Financial Planning® awards the CHARTERED RETIREMENT PLANNING COUNSELOR CRPC® designation to students who:

- successfully complete the program
- pass the final examination; and
- comply with the Code of Ethics, which includes agreeing to abide by the Standards of Professional Conduct and Terms and Conditions. Applicants must also disclose of any criminal, civil, self-regulatory organization, or governmental agency inquiry, investigation, or proceeding relating to their professional or business conduct. Conferment of the designation is contingent upon the College for Financial Planning's review of matters either self-disclosed or which are discovered by the College that are required to be disclosed.

Every two years individuals must renew their right to continue using the CRPC® designation by:

- completing 16 hours of continuing education
- reaffirming to abide by the Standards of Professional Conduct, Terms and Conditions, and self-disclose any criminal, civil, self-regulatory organization, or governmental agency inquiry, investigation, or proceeding relating to their professional or business conduct; and paying a biennial renewal fee.

BROCHURE SUPPLEMENT

March 26, 2025

This brochure supplement provides information about Alex Robert Stowe, Jr. that supplements the Avior Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Veronica LeDuc if you did not receive the Avior Wealth Management, LLC brochure or if you have any questions about the contents of this supplement.

Additional information about Alex Robert Stowe, Jr. is available on the SEC's website at

www.adviserinfo.sec.gov.

Alex Robert (Bob) Stowe, Jr. CFP®

Avior Wealth Management, LLC

1316 Village Creek, Suite 700

Plano, Texas 75093

(972) 733-9959

Educational Background and Business Experience

Alex Robert (Bob) Stowe, Jr. earned a Bachelor of Science from the United States Naval Academy in 1978. Mr. Stowe also earned an MBA from Southern Methodist University, Edwin, L. Cox School of Business in 1988.

Disciplinary Information

Mr. Stowe has no disciplinary history that is required to be disclosed by the U.S. Securities and Exchange Commission or state regulatory authorities.

Other Business Activities

Mr. Stowe spends all his work week on advisory matters.

Additional Compensation

Mr. Stowe does not receive any other economic benefit from a non-advisory client for the provision of advisory services.

Supervision

Alex Robert (Bob) Stowe is a member of Avior Wealth Management, LLC. Veronica LeDuc, the Chief Compliance Officer, is responsible for developing, overseeing and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives, including Mr. Stowe. They may both be contacted at (402) 218-4064.

Professional Designation Disclosure

¹ The Certified Financial Planner™ (CFP®) designation is issued by the Certified Financial Planner Board of Standards, Inc. It is a voluntary certification recognized by the United States and other countries for its (1) high standard of professional education, (2) stringent code of conduct and standards of practice and (3) ethical requirements governing professional engagements with clients. A candidate for designation must first obtain a bachelor's degree from an accredited college or university with courses that included financial planning subject areas (e.g., insurance planning, risk management, employee benefits planning, investment planning, income tax planning, retirement planning and estate planning). Candidates must also have at least 3 years of full-time personal financial planning experience, measured as 2,000 hours per year. CFP® candidates must pass a comprehensive examination designed to test their ability to correctly diagnose financial planning issues and apply their knowledge to real world circumstances. Candidates must also agree to be bound by the Certified Financial Planner Board's Standards of Professional Conduct. Anyone earning designation as a CFP® must complete 30 hours of continuing education every two years and renew the agreement to be bound by the Standards of Professional Conduct.

BROCHURE SUPPLEMENT

March 26, 2025

This brochure supplement provides information about Breanna R. Beck that supplements the Avior Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Veronica LeDuc if you did not receive the Avior Wealth Management, LLC brochure or if you have any questions about the contents of this supplement.

Additional information about Brenna R. Beck is available on the SEC's website at

www.adviserinfo.sec.gov.

Breanna R. Beck

Avior Wealth Management, LLC
3720 North High Street
Columbus, OH 43214
Phone: (614) 372-5430

Educational Background and Business Experience

Breanna Beck graduated with a Bachelor of Science in Consumer and Family Financial Services from The Ohio State University.

In addition, Beck became a Certified Financial Planner (CFP®) in 2021. Also, in 2020, Beck received her N.A.S.A.A Series 65 license (Investment Advisor's Law Exam, administered by FINRA) and her Securities Industry Essentials Exam (also administered by FINRA).

Breanna Beck's prior business experience to Avior includes working for Fullen Financial Group as an Associate Financial Advisor and for Ameriprise Financial as a Financial Planning Intern.

Disciplinary Information

Breanna Beck has no disciplinary history that is required to be disclosed by the U.S.

Securities and Exchange Commission or state regulatory authorities.

Other Business Activities

Ms. Beck spends all her work week on advisory matters.

Additional Compensation

Breanna Beck does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Supervision

Breanna R Beck is a managing member for Avior Wealth Management, LLC. Veronica LeDuc is responsible for developing, overseeing, and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives, including Ms. Beck. Ms. LeDuc may be contacted at (402) 218-4064.

BROCHURE SUPPLEMENT

July 29, 2025

This brochure supplement provides information about Britt E. Campbell that supplements the Avior Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Veronica LeDuc if you did not receive the Avior Wealth Management, LLC brochure or if you have any questions about the contents of this supplement.

Additional information about Britt E. Campbell is available on the SEC's website at www.adviserinfo.sec.gov.

Britt E. Campbell

Avior Wealth Management, LLC
14301 First National Bank Parkway, Suite 410
Omaha, Nebraska 68154
Phone: (402) 218-4064

Educational Background and Business Experience

Britt E. Campbell was born in 1977 and graduated from the University of Nebraska at Omaha in 1999 with a Bachelor of Science Degree in Finance. He has been a member and an Investment Advisor Representative with Avior Wealth Management, LLC since April 2011. He was the President and Chief Compliance Officer and an Investment Advisor Representative with Campbell Wealth Management, Inc. from November 2007 to March 2011. He has been a Registered Representative with Purshe Kaplan Sterling Investments from November 2007 to November 2015. From May 2000 to November 2007, he was a Financial Advisor with Wells Fargo Investments.

Disciplinary Information

Britt E. Campbell has no disciplinary history that is required to be disclosed by the U.S.

Securities and Exchange Commission or state regulatory authorities.

Other Business Activities

Britt Campbell is also independently licensed as an insurance agent and may sell insurance products to clients and receive commissions when doing so. This is a potential conflict of interest, since commissions earned could be in addition to advisory fees earned in his capacity as an investment advisor representative. Clients are never obligated or required to purchase insurance products from or through Britt Campbell and may select any independent insurance agent and insurance company to purchase insurance products. Regardless of the insurance agent selected, the insurance agent or agency will receive normal commissions from the sale.

Mr. Campbell spends all of his work week on client advisory matters and management of Avior's employees.

Additional Compensation

Britt E. Campbell does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Supervision

Britt E. Campbell is a managing member for Avior Wealth Management, LLC. Veronica LeDuc is responsible for developing, overseeing, and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives, including Mr. Campbell. Ms. LeDuc may be contacted at (402) 218-4064.

BROCHURE SUPPLEMENT

March 26, 2025

This brochure supplement provides information about Bruce C. Kuehl that supplements the Avior Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Veronica LeDuc if you did not receive the Avior Wealth Management, LLC brochure or if you have any questions about the contents of this supplement.

Additional information about Bruce C. Kuehl is available on the SEC's website at

www.adviserinfo.sec.gov.

Bruce C. Kuehl CFP®

Avior Wealth Management, LLC

11100 Wayzata Blvd. Suite 210

Minnetonka, MN 55305

Phone (763) 542-2884

Educational Background and Business Experience

Mr. Kuehl attended Minnesota State University in Mankato and graduated in 1983 with a BA in Finance. Mr. Kuehl attained the designation as a Certified Financial Planner™ (CFP®) in 1993.

Before joining Avior Wealth Management, LLC., Mr. Kuehl formed Lifestage Wealth Management. Prior to that, Mr. Kuehl was a registered representative with Questar Capital Corporation. Previously he was an investment advisor and president of Miller-Green Financial Planning Services, Inc., a registered representative with Sanders Morris and Harris, Inc., a registered representative for IFG Network Securities and a registered representative with FSC Securities Corporation.

Disciplinary Information

Mr. Kuehl has no disciplinary history that is required to be disclosed by the U.S. Securities and Exchange Commission or state regulatory authorities.

Other Business Activities

Mr. Kuehl spends all his work week on advisory matters.

Mr. Kuehl is also independently licensed as an insurance agent and may sell insurance products to clients and receive commissions when doing so. This is a potential conflict of interest, since commissions earned could be in addition to advisory fees earned in his capacity as an investment advisor representative. Clients are never obligated or required to purchase insurance products from or through Mr. Kuehl and may select any independent insurance agent and insurance company to purchase insurance products. Regardless of the insurance agent selected, the insurance agent or agency will receive normal commissions from the sale.

Additional Compensation

Mr. Kuehl does not receive any economic benefit from a non-advisory client for the provision of advisory services except for insurance products as stated above.

Supervision

Bruce Keuhl is a member of Avior Wealth Management, LLC. Veronica LeDuc, the Chief Compliance Officer, is responsible for developing, overseeing, and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives, including Mr. Kuehl. They may both be contacted at (402) 218-4064.

Professional Designation Disclosure

¹ The Certified Financial Planner™ (CFP®) designation is issued by the Certified Financial Planner Board of Standards, Inc. It is a voluntary certification recognized by the United States and other countries for its (1) high standard of professional education, (2) stringent code of conduct and standards of practice and (3) ethical requirements governing professional engagements with clients. A candidate for designation must first obtain a bachelor's degree from an accredited college or university with courses that included financial planning subject areas (e.g., insurance planning, risk management, employee benefits planning, investment planning, income tax planning, retirement planning and estate planning). Candidates must also have at least 3 years of full-time personal financial planning experience, measured as

2,000 hours per year. CFP[®] candidates must pass a comprehensive examination designed to test their ability to correctly diagnose financial planning issues and apply their knowledge to real world circumstances. Candidates must also agree to be bound by the Certified Financial Planner Board's Standards of Professional Conduct. Anyone earning designation as a CFP[®] must complete 30 hours of continuing education every two years and renew the agreement to be bound by the Standards of Professional Conduct.

BROCHURE SUPPLEMENT

January 2, 2026

This brochure supplement provides information about Cheryl Blakey that supplements the Avior Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Veronica LeDuc if you did not receive the Avior Wealth Management, LLC brochure or if you have any questions about the contents of this supplement.

Additional information about Cheryl Blakey (CRD # 6058053) is available on the SEC's website at

www.adviserinfo.sec.gov.

Cheryl Blakey

Avior Wealth Management, LLC

3200 Douglas Blvd., Suite 305

Roseville, CA 95661

(916) 367-4540

Educational Background and Business Experience

Cheryl Blakey was born in 1960. Ms. Blakey graduated from University of Delaware, with a BSBA in Marketing, Economics & Finance.

Ms. Blakey has been a member and an Investment Advisor Representative of Avior Wealth Management, LLC since January 2026. Before joining Avior Wealth Management, the predecessor to Avior, she was employed as an investment advisor representative of EWG Elevate Inc. dba Protection Point Advisors from October 2023 through December 2025.

Disciplinary Information

Cheryl Blakey was suspended by FINRA for 15 days and fined in August 2019 for not resolving a client complaint through her firm at the time. She was terminated by this firm for not following company policies.

Other Business Activities

Cheryl Blakey is also independently licensed as an insurance agent and may sell insurance products to clients and receive commissions when doing so. This is a potential conflict of interest, since commissions earned could be in addition to advisory fees earned in her capacity as an investment advisor representative. Clients are never obligated or required to purchase insurance products from or through Cheryl Blakey and may select any independent insurance agent and insurance company to purchase insurance products. Regardless of the insurance agent selected, the insurance agent or agency will receive normal commissions from the sale.

Cheryl Blakey spends all her work week on advisory matters.

Additional Compensation

Cheryl Blakey does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Supervision

Cheryl Blakey is a member of Avior Wealth Management, LLC. Veronica LeDuc, the Chief Compliance Officer, is responsible for developing, overseeing, and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives, including Ms. Blakey. They may both be contacted at (402) 218-4064.

BROCHURE SUPPLEMENT

July 29, 2025

This brochure supplement provides information about Christopher Trub that supplements the Avior Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Veronica LeDuc if you did not receive the Avior Wealth Management, LLC brochure or if you have any questions about the contents of this supplement.

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

Christopher Trub CFP®

9901 IH-10 West, Suite 745 (Colonnade I Office Building)

San Antonio, TX 78230

Phone: (210) 822-5252

Educational Background and Business Experience

Christopher Trub graduated in 2003 from the University of Texas at San Antonio with a bachelor's degree in Business Administration and Finance. In 2004, Mr. Trub started working at USAA Investment Management and Financial Advisors until 2019 when he joined Nelson Van Denburg & Campbell Wealth Management Group, LLC, the predecessor to Avior Wealth Management, LLC. Mr. Trub has also obtained the designation as a Certified Financial Planner (CFP®).¹

Disciplinary Information

Christopher Trub has no disciplinary history that is required to be disclosed by the U.S. Securities and Exchange Commission or state regulatory authorities.

Other Business Activities

Christopher Trub is also independently licensed as an insurance agent and may sell insurance products to clients and receive commissions when doing so. This is a potential conflict of interest, since commissions earned could be in addition to advisory fees earned in his capacity as an investment advisor representative. Clients are never obligated or required to purchase insurance products from or through Christopher Trub and may select any independent insurance agent and insurance company to purchase insurance products. Regardless of the insurance agent selected, the insurance agent or agency will receive normal commissions from the sale.

Mr. Trub spends all his work week on advisory matters.

Additional Compensation

Christopher Trub does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Supervision

Christopher Trub is a member of Avior Wealth Management, LLC. Veronica LeDuc, the Chief Compliance Officer, is responsible for developing, overseeing, and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives, including Mr. Trub. They may both be contacted at (402) 218-4064.

Professional Designation Disclosure

¹ The Certified Financial Planner™ (CFP®) designation is issued by the Certified Financial Planner Board of Standards, Inc. It is a voluntary certification recognized by the United States and other countries for its

(1) high standard of professional education, (2) stringent code of conduct and standards of practice and (3) ethical requirements governing professional engagements with clients. A candidate for designation must first obtain a bachelor's degree from an accredited college or university with courses that included financial planning subject areas (e.g., insurance planning, risk management, employee benefits planning, investment planning, income tax planning, retirement planning and estate planning). Candidates must also have at least 3 years of full-time personal financial planning experience, measured as 2,000 hours per year. CFP® candidates must pass a 2-day comprehensive examination designed to test their ability to correctly diagnose financial planning issues and apply their knowledge to real world circumstances. Candidates must also agree to be bound by the Certified Financial Planner

Board's Standards of Professional Conduct. Anyone earning designation as a CFP[®] must complete 30 hours of continuing education every two years and renew the agreement to be bound by the Standards of Professional Conduct.

Brochure Supplement

March 26, 2025

This brochure supplement provides information about Clint Fish that supplements the Avior Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Veronica LeDuc if you did not receive the Avior Wealth Management, LLC brochure or if you have any questions about the contents of this supplement.

Additional information about Clint Fish is available on the SEC's website at

www.adviserinfo.sec.gov.

Clint Fish CFP®, MBA, MRFC

1802 W 17th Street, Suite 1

Bloomington, IN 47404

Phone: (812) 336-4810 ext 1002

Educational Background and Business Experience

In 2022, Clint Fish graduated from Strayer University and received a Masters in Business Administration. In 1998 he graduated from the College for Financial Planning, Denver, CO. and was awarded a degree in Financial Planning. The International Association of Registered Financial Consultant (IARFC) Middleton, OH, awarded him the designation of RFC - Registered Financial Consultant in 2003 and MRFC - Master Registered Financial Consultant in 2018.

Prior to working with Avior, from 2001 he was the President and CEO of First American Trust LLC, and from 2015 he also owned and operated the First American Advisory LLC. During this time, he was a Registered Representative with Coastal Equities from 2014 to 2023 and from 2001 to 2014, he was a Registered Representative at Princor Financial Services. From 2019 to present Mr. Fish has served as the General Partner and Chief Investment Officer for Ironwood Investment Management LLC. Fish was Vice President of Investment Services at Monroe Bank / ONB from 1999 to 2000. From 1992 to 1999, he was Sr. Vice President at NBD Bank / Chase. From 1990 to 1992, he worked at Sutra Financial Services as a financial consultant.

Disciplinary Information

Clint Fish has no disciplinary history that is required to be disclosed by the U.S. Securities and Exchange Commission or state regulatory authorities.

Other Business Activities

Clint Fish is the General Partner and Chief Investment Officer and majority owner of Ironwood Investment Management, LLC. (Ironwood) Ironwood manages the Venture Capital Funds. Ironwood is not an affiliate of Avior Wealth Management, LLC. In addition, Mr. Fish is licensed to sell insurance related products. As a result of such activity there is a conflict of interest.

Additional Compensation

Clint Fish does not receive any economic benefit from a non-advisory client for the provision of advisory services. He does receive compensation for insurance related products.

Supervision

Clint Fish is a member of Avior Wealth Management, LLC. Veronica LeDuc, the Chief Compliance Officer, is responsible for developing, overseeing and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives, including Mr. Fish. They may both be contacted at (402) 218-4064.

Professional Designation Information

1. The Certified Financial Planner™ (CFP®) designation is issued by the Certified Financial Planner Board of Standards, Inc. It is a voluntary certification recognized by the United States and other countries for its (1) high standard of professional education, (2) stringent code of conduct and standards of practice and (3) ethical requirements governing professional engagements with clients. A candidate for designation must first obtain a bachelor's degree from an accredited college or university with courses that included financial planning subject areas (e.g., insurance planning, risk management, employee benefits planning, investment planning, income tax planning, retirement planning and estate planning). Candidates must also have at least 3 years of full-time personal financial planning experience, measured as 2,000 hours per year. CFP® candidates must pass a 2-day comprehensive examination designed to test their ability to correctly diagnose financial planning issues and apply their knowledge to real world circumstances. Candidates must also agree to be bound by the Certified Financial Planner Board's Standards of Professional Conduct. Anyone earning designation as a CFP® must complete 30 hours of continuing education every two years and renew the agreement to be bound by the Standards of Professional Conduct.
2. The Master Registered Financial Consultant (MRFC) designation is a professional credential given to financial advisors who have met the International Association of Registered Financial Consultants' (IARFC) high standards of education, experience, and ethics.

BROCHURE SUPPLEMENT

March 26, 2025

This brochure supplement provides information about Curtis Smith that supplements the Avior Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Veronica LeDuc if you did not receive the Avior Wealth Management, LLC brochure or if you have any questions about the contents of this supplement.

Additional information about Curtis Smith is available on the SEC's website at

www.adviserinfo.sec.gov.

Curtis Smith

Avior Wealth Management, LLC
14648 N. Scottsdale Road Suite 300
Scottsdale, Arizona 85254
(480) 582-1910

Educational Background and Business Experience

Mr. Smith graduated from Community College of The Air Force in 2004.

Before joining Avior Wealth Management, LLC., Curtis Smith worked for Raymond James Financial Services from 2009 through 2018, RDW & Associates Inc. from 2010 to 2018, First State Bank Nebraska from 2017 to 2022, Kingswood Capital Partners LLC from 2018 to 2022 and Capital Wealth Alliance from 2018 to 2022.

Disciplinary Information

Mr. Smith has no disciplinary history that is required to be disclosed by the U.S. Securities and Exchange Commission or state regulatory authorities.

Other Business Activities

Mr. Smith spends all his work week on advisory matters.

Mr. Smith is independently licensed as an insurance agent and may sell insurance products to clients and receive commissions when doing so. This is a potential conflict of interest, since commissions earned could be in addition to advisory fees earned in his capacity as an investment advisor representative. Clients are never obligated or required to purchase insurance products from or through Mr. Smith and may select any independent insurance agent and insurance company to purchase insurance products. Regardless of the insurance agent selected, the insurance agent or agency will receive normal commissions from the sale.

Mr. Smith is an Officer, and Director of First State Bank Nebraska, for which he serves as an advisory board member. Mr. Smith's duties as an Officer of First State Bank Nebraska does not create a conflict of interest to his provision of advisory services through Avior Wealth Management, LLC.

Additional Compensation

Mr. Smith does not receive any other economic benefit from a non-advisory client for the provision of advisory services.

Supervision

Curtis Smith is a member of Avior Wealth Management, LLC. Veronica LeDuc, the Chief Compliance Officer, is responsible for developing, overseeing and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives, including Mr. Smith. They may both be contacted at (402) 218-4064.

Brochure Supplement

March 26, 2025

This brochure supplement provides information about David Burritt that supplements the Avior Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Veronica LeDuc if you did not receive the Avior Wealth Management, LLC brochure or if you have any questions about the contents of this supplement.

Additional information about David Burritt is available on the SEC's website at

www.adviserinfo.sec.gov.

David Burritt CFP®, ChFC®

2880 Cleveland Ave, Suite 2

Santa Rosa, CA 95403

Phone: (707) 576-8700

Educational Background and Business Experience

David Burritt was born in 1985 and graduated from Sonoma State University with a bachelor's degree. He also attended The American College of Financial Planning, Accredited Certificate Program.

Prior to working with Avior, Burritt was a Vice President Financial Advisor for Merrill Lynch since 2022. Before that he was Vice President Private Client Advisor from 2021 to 2022 for JPMorgan. And before that he was Senior Vice President Branch Manager for JPMorgan Chase & CO. from 2010 to 2021.

Disciplinary Information

David Burritt has no disciplinary history that is required to be disclosed by the U.S. Securities and Exchange Commission or state regulatory authorities.

Other Business Activities

Aside from being a trustee of the Jeff R. and Tracy L. revocable trust, Mr. Burritt spends all his work week on advisory matters.

Additional Compensation

David Burritt does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Supervision

David Burritt is a member of Avior Wealth Management, LLC. Veronica LeDuc, the Chief Compliance Officer, is responsible for developing, overseeing and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives, including Mr. Burritt. They may both be contacted at (402) 218-4064.

Professional Designation Information

1. The Chartered Financial Consultant ®(ChFC®) is a professional designation that is granted by The American College upon completion of seven required courses and two elective courses (equivalent of 27 semester credit hours) followed by a proctored exam for each course. The curriculum to earn this designation is comprised of courses designed to provide training in understanding key elements in the financial planning world such as retirement planning, estate planning, insurance, investments, and income taxes, as well as practical application of the skills learned in real-life scenarios. A minimum of three years of full-time business experience within the five years preceding the designation is a prerequisite. Once the designation is earned, 30 continuing education credits are required every two years to maintain the credential.

2. The Certified Financial Planner™ (CFP®) designation is issued by the Certified Financial Planner Board of Standards, Inc. It is a voluntary certification recognized by the United States and other countries for its (1) high standard of professional education, (2) stringent code of conduct and standards of practice and (3) ethical requirements governing professional engagements with clients. A candidate for designation must first obtain a bachelor's degree from an accredited college or university with courses that included financial planning subject areas (e.g., insurance planning, risk management, employee benefits planning, investment planning, income tax planning, retirement planning and estate planning). Candidates must also have at least 3 years of full-time personal financial planning experience, measured as 2,000 hours per year. CFP® candidates must pass a 2-day comprehensive examination designed to test their ability to correctly diagnose financial planning issues and apply their knowledge to real world circumstances. Candidates must also agree to be bound by the Certified Financial Planner Board's Standards of Professional Conduct. Anyone earning designation as a CFP® must complete 30 hours of continuing education every two years and renew the agreement to be bound by the Standards of Professional Conduct.

BROCHURE SUPPLEMENT

March 6, 2026

This brochure supplement provides information about David Vaughan that supplements the Avior Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Veronica LeDuc if you did not receive the Avior Wealth Management, LLC brochure or if you have any questions about the contents of this supplement.

Additional information about David Vaughan is available on the SEC's website at

www.adviserinfo.sec.gov.

David Vaughan

Avior Wealth Management, LLC
10655 Six Pines Drive, Ste. 100
The Woodlands, Texas 77380
(281) 367-2483

Educational Background and Business Experience

Mr. Vaughan graduated from Sam Houston State University with a BBA Degree.

Before joining Avior Wealth Management, LLC., Mr. Vaughan worked for Woodlands Asset Management, Inc. Mr. Vaughan also works for Navigator Securities Limited.

Disciplinary Information

Mr. Vaughan has no disciplinary history that is required to be disclosed by the U.S.

Securities and Exchange Commission or state regulatory authorities.

Other Business Activities

Mr. Vaughan spends all his work week on financial matters.

Mr. Vaughan is affiliated with a broker/dealer, Momentum Independent Network (MIN), member FINRA/SIPC. Because other compensation is received from the broker/dealer, there may be an incentive to recommend investment products based upon the compensations received rather than on the client's needs. However, Avior discloses to clients this conflict and other compensation in both the ADV Part 2A and Part 2B. To mitigate this conflict, the type of advice given by Mr. Vaughan to Avior clients differs from the transaction-based advice given to clients of MIN. There are also investment products not offered by Avior and therefore transacted through MIN. Avior maintains policies and procedures to address this conflict of interest and to ensure mitigation, when possible. Avior and MIN are not affiliated entities.

Mr. Vaughan is independently licensed as an insurance agent and may sell insurance products to clients and receive commissions when doing so. This is a potential conflict of interest, since commissions earned could be in addition to advisory fees earned in his capacity as an investment advisor representative. Clients are never obligated or required to purchase insurance products from or through Mr. Vaughan and may select any independent insurance agent and insurance company to purchase insurance products. Regardless of the insurance agent selected, the insurance agent or agency will receive normal commissions from the sale.

Additional Compensation

Mr. Vaughan, as registered representative of, Navigator Securities Limited, received commissions and trailing fees from the sale of mutual funds and other securities or investment products. In addition, he received compensation as an employee of Avior Wealth Management. This poses the same conflicts as stated in "Other Business Activities".

Supervision

David Vaughan is a member of Avior Wealth Management, LLC. Veronica LeDuc, the Chief Compliance Officer, is responsible for developing, overseeing and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives, including Mr. Vaughan. They may both be contacted at (402) 218-4064.

Brochure Supplement

March 26, 2025

This brochure supplement provides information about Donald W. Stanley, II that supplements the Avior Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Veronica LeDuc if you did not receive the Avior Wealth Management, LLC brochure or if you have any questions about the contents of this supplement.

Additional information about Donald W. Stanley, II is available on the SEC's website at www.adviserinfo.sec.gov.

Donald W. Stanley, II
1535 The Greens Way
Jacksonville Beach, FL 32250
Phone: (904) 260-2040

Educational Background and Business Experience

Donald Stanley was born in 1982 and graduated from the University of Nebraska - Lincoln in 2006 with a Bachelor of Science degree in Business Administration. He has been an Investment Advisor Representative with Nelson, Van Denburg & Campbell Wealth Management Group LLC, the predecessor to Avior Wealth Management LLC since August 2017. Before joining Avior Wealth Management, LLC, he was a financial advisor with Fidelity Brokerage Services, LLC from September 2014 to August 2017. He had been a financial advisor with Waddell & Reed from October 2012 to September 2014 and with TD Ameritrade, Inc. from January 2008 to September 2012. Mr. Stanley has achieved the designation of Chartered Retirement Planning Counselor (CRPC®).¹

Disciplinary Information

Donald Stanley has no disciplinary history that is required to be disclosed by the U.S. Securities and Exchange Commission or state regulatory authorities.

Other Business Activities

Donald Stanley is also independently licensed as an insurance agent and may sell insurance products to clients and receive commissions when doing so. This is a potential conflict of interest, since commissions earned could be in addition to advisory fees earned in his capacity as an investment advisor representative. Clients are never obligated or required to purchase insurance products from or through Donald Stanley and may select any independent insurance agent and insurance company to purchase insurance products. Regardless of the insurance agent selected, the insurance agent or agency will receive normal commissions from the sale.

Mr. Stanley spends all his work week on advisory matters.

Additional Compensation

Donald W. Stanley II does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Supervision

Donald Stanley is a member of Avior Wealth Management, LLC. Veronica LeDuc, the Chief Compliance Officer, is responsible for developing, overseeing and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives, including Mr. Stanley II. They may both be contacted at (402) 218-4064.

Professional Designation Information

¹The Chartered Retirement Planning CounselorSM(CRPC[®]) designation is administered by the College for Financial Planning. The CRPC designation signifies that an individual has met initial and on-going experience, ethical, education and examination requirements. To obtain the CRPC certification, candidates must successfully complete nine separate modules with a final proctored exam at an approved testing center. The College of Financial Planning awards its professional designations to individuals who have completed the educational program, passed the final examination and adhered to the organization's Code of Conduct including Standards of Professional Conduct, Self-Disclosure and continuing education requirements of 16 hours every two years.



BROCHURE SUPPLEMENT

June 6, 2025

This brochure supplement provides information about Dylan Gaver that supplements the Avior Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Veronica LeDuc if you did not receive the Avior Wealth Management, LLC brochure or if you have any questions about the contents of this supplement.

Additional information about Dylan Gaver is available on the SEC's website at

www.adviserinfo.sec.gov.

DYLAN GAVER, CFP®

Avior Wealth Management, LLC

14301 First National Bank Parkway, Suite 410

Omaha, Nebraska 68154

Phone: (402) 218-4064

Educational Background and Business Experience

Dylan Gaver was born in 1980. Mr. Gaver graduated from Northern Kentucky University with a Bachelor of Science; Oklahoma State University with a Master of Science; and the University of Notre Dame with a Master of Business Administration. In 2015, Mr. Gaver attained the designation of Certified Financial Planner practitioner (CFP).

Mr. Gaver has been an Investment Adviser Representative of Avior Wealth Management, LLC since June 2025. Before joining Avior Wealth Management, he was employed as an investment adviser representative and Vice President of Brivin, Inc., dba The Sherrington Group (January 2022-June 2025); Wealth Manager at Budros, Ruhlin & Roe, Inc. (June 2019 to December 2021); Wealth Strategist at PNC Financial Services, Inc. (March 2014 to June 2019); and Director of Territory Development at Nationwide Financial, Inc. (April 2009 to

BROCHURE SUPPLEMENT

January 29, 2026

This brochure supplement provides information about John Wayne McMannama that supplements the Avior Wealth Management, LLC brochure. Please contact Liz Sanley if you did not receive the Avior Wealth Management, LLC brochure or if you have any questions about the contents of this supplement.

Additional information about John Wayne McMannama is available on the following website:

www.advisorinfo.sec.gov.

John Wayne McMannama

Avior Wealth Management, LLC
14301 First National Bank Parkway, Suite 410
Omaha, Nebraska 68154
402.218-4064

Educational Background and Business Experience

John Wayne McMannama was born August 26, 1952, and received a Bachelor of Science degree in Business Administration from the University of Nebraska, Lincoln in 1974; subsequent to graduating from Shenandoah, Iowa High School in 1970. He has been an Investment Advisor Representative with Avior Wealth Management, LLC since September 2015. John Wayne McMannama was also President and sole shareholder of McMannama & Associates, Inc. from September 1984 to October 2015.

Disciplinary Information

John Wayne McMannama has no disciplinary history that is required to be disclosed by the U. S. Securities and Exchange Commission or state regulatory authorities.

Other Business Activities

In December 2007, Mr. McMannama joined MoneySunk Investors, an investment club organized in the state of Nebraska and located at 4700 F Street, Omaha, NE 68117. Mr. McMannama's initial ownership position was less than 5% of the net asset value of the investment portfolio of MoneySunk Investors. As an active member of the investment club, Mr. McMannama may make purchase or sale recommendations of securities owned by the clients of Avior Wealth Management, LLC which may also be owned by the investment club. Mr. McMannama devotes approximately 3 hours per month attending MoneySunk Investor meetings. All meetings are held in the evening and not during securities trading hours.

Mr. McMannama spends all his work week on advisory matters.

Additional Compensation

John Wayne McMannama does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Supervision

John Wayne McMannama is a member of Avior Wealth Management, LLC. Veronica LeDuc, the Chief Compliance Officer, is responsible for developing, overseeing and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives, including Mr. McMannama. They may both be contacted at (402) 218-4064.

BROCHURE SUPPLEMENT

August 29, 2025

This brochure supplement provides information about Jason Weingarten that supplements the Avior Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Veronica LeDuc if you did not receive the Avior Wealth Management, LLC brochure or if you have any questions about the contents of this supplement.

Additional information about Jason Weingarten (CRD # 8144582) is available on the SEC's website at

www.adviserinfo.sec.gov.

Jason Weingarten

Avior Wealth Management, LLC
14648 N. Scottsdale Rd, Suite 300
Scottsdale, AZ 85254
Phone: 480.391.9091

Educational Background and Business Experience

Jason Weingarten was born in 1998. Mr. Weingarten graduated from University of Colorado - Boulder, with a Bachelor of Arts in Economics.

Mr. Weingarten has been a member and an Investment Advisor Representative of Avior Wealth Management, LLC since July 2025.

Disciplinary Information

Jason Weingarten has no disciplinary history that is required to be disclosed by the U.S. Securities and Exchange Commission or state regulatory authorities.

Other Business Activities

Jason Weingarten spends all his work week on advisory matters.

Additional Compensation

Jason Weingarten does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Supervision

Jason Weingarten is a member of Avior Wealth Management, LLC. Veronica LeDuc, the Chief Compliance Officer, is responsible for developing, overseeing, and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives, including Mr. Weingarten. They may both be contacted at (402) 218-4064.

BROCHURE SUPPLEMENT

July 29, 2025

This brochure supplement provides information about Jay Nelson that supplements the Avior Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Veronica LeDuc if you did not receive the Avior Wealth Management, LLC brochure or if you have any questions about the contents of this supplement.

Additional information about Jay Nelson is available on the SEC's website at

www.adviserinfo.sec.gov.

Jay Nelson

Avior Wealth Management, LLC
14301 First National Bank Parkway, Suite 410
Omaha, Nebraska 68154
Phone: (402) 218-4064

Educational Background and Business Experience

Jay Nelson attended the University of Nebraska at Lincoln before transferring to the University of South Dakota where he graduated with a Bachelor of Science degree in Finance. Mr. Nelson has also obtained the designation as a Certified Financial Planner (CFP[®]).¹

Disciplinary Information

Jay Nelson has no disciplinary history that is required to be disclosed by the U.S. Securities and Exchange Commission or state regulatory authorities.

Other Business Activities

Mr. Nelson spends all his work week on advisory matters.

Additional Compensation

Jay Nelson does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Supervision

Jay Nelson is a member of Avior Wealth Management, LLC. Veronica LeDuc, the Chief Compliance Officer, is responsible for developing, overseeing, and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives, including Mr. Nelson. They may both be contacted at (402) 218-4064.

Professional Designation Disclosure

¹ The Certified Financial Planner™ (CFP®) designation is issued by the Certified Financial Planner Board of Standards, Inc. It is a voluntary certification recognized by the United States and other countries for its (1) high standard of professional education, (2) stringent code of conduct and standards of practice and (3) ethical requirements governing professional engagements with clients. A candidate for designation must first obtain a bachelor's degree from an accredited college or university with courses that included financial planning subject areas (e.g., insurance planning, risk management, employee benefits planning, investment planning, income tax planning, retirement planning and estate planning). Candidates must also have at least 3 years of full-time personal financial planning experience, measured as 2,000 hours per year. CFP® candidates must pass a 2-day comprehensive examination designed to test their ability to correctly diagnose financial planning issues and apply their knowledge to real world circumstances. Candidates must also agree to be bound by the Certified Financial Planner Board's Standards of Professional Conduct. Anyone earning designation as a CFP® must complete 30 hours of continuing education every two years and renew the agreement to be bound by the Standards of Professional Conduct.

BROCHURE SUPPLEMENT

March 26, 2025

This brochure supplement provides information about Jeremy Michael Palensky that supplements the Avior Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Veronica LeDuc if you did not receive the Avior Wealth Management, LLC brochure or if you have any questions about the contents of this supplement.

Additional information about Jeremy Michael Palensky is available on the SEC's website at www.adviserinfo.sec.gov.

Jeremy Michael Palensky

Avior Wealth Management, LLC

14301 FNB Pkwy Suite 410

Omaha, NE 68154

Phone : 402-218-4064

Educational Background and Business Experience

Jeremy Michael Palensky graduated from Doane College with a Bachelor of Arts in Music Education in 2009. In 2015, he graduated from Doane College with a Master of Education in Curriculum & Instruction. Five years later, in 2020, Palensky graduated with a degree in Business Management and Financial Planning from Metro Community College.

Along with Jeremy Palensky's degrees, he became an Accredited Investment Fiduciary (AIF) in 2021 from Fi360.

Before working with Avior, Jeremy worked at First National Bank – Raymond James beginning in 2016. He had a brief stint at Bank of the West in 2016. Prior to this, he was hired on at D. Bryant Retirement Strategies – Retirement Wealth Advisors, in 2014. He worked at Charles Schwab in 2014 as well. Previous to this employment, he worked at Edward Jones beginning in 2008.

Disciplinary Information

Palensky has no disciplinary history that is required to be disclosed by the U.S. Securities and Exchange Commission or state regulatory authorities.

Other Business Activities

Mr. Palensky spends all his work week on advisory matters.

Additional Compensation

Mr. Palensky does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Supervision

Jeremy Michael Palensky is a member of Avior Wealth Management, LLC. Veronica LeDuc, the Chief Compliance Officer, is responsible for developing, overseeing, and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives, including Mr. Palensky. They may both be contacted at (402) 218-4064.

BROCHURE SUPPLEMENT

June 11, 2025

This brochure supplement provides information about John Eaton that supplements the Avior Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Veronica LeDuc if you did not receive the Avior Wealth Management, LLC brochure or if you have any questions about the contents of this supplement.

Additional information about John Eaton is available on the SEC's website at

www.adviserinfo.sec.gov.

John Eaton CFP®

Avior Wealth Management, LLC

9901 IH-10 West, Suite 745
(Colonnade I Office Building)
San Antonio, TX 78230

Phone: (210) 822-5252

Educational Background and Business Experience

John Eaton graduated in 1994 from the University of Texas at Austin with a Bachelor of Arts degree in Economics. Before joining Nelson Van Denburg & Campbell Wealth Management Group, LLC, the predecessor to Avior Wealth Management, LLC, in October 2019, Mr. Eaton worked as a financial advisor at Cypress Wealth Advisors from January 2014 to October 2019. Mr. Eaton has obtained the designation as a Certified Financial Planner™ (CFP®).

Disciplinary Information

John Eaton has no disciplinary history that is required to be disclosed by the U.S. Securities and Exchange Commission or state regulatory authorities.

Other Business Activities

Mr. Eaton spends all his work week on advisory matters.

Additional Compensation

John Eaton does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Supervision

John Eaton is a member for Avior Wealth Management, LLC. Veronica LeDuc, the Chief Compliance Officer, is responsible for developing, overseeing, and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives, including Mr. Eaton. They may both be contacted at (402) 218-4064.

Professional Designation Disclosure

¹ The Certified Financial Planner™ (CFP®) designation is issued by the Certified Financial Planner Board of Standards, Inc. It is a voluntary certification recognized by the United States and other countries for its (1) high standard of professional education, (2) stringent code of conduct and standards of practice and (3) ethical requirements governing professional engagements with clients. A candidate for designation must first obtain a bachelor's degree from an accredited college or university with courses that included financial planning subject areas (e.g., insurance planning, risk management, employee benefits planning, investment planning, income tax planning, retirement planning and estate planning). Candidates must also have at least 3 years of full-time personal financial planning experience, measured as 2,000 hours per year. CFP® candidates must pass a 2-day comprehensive examination designed to test their ability to correctly diagnose financial planning issues and apply their knowledge to real world circumstances. Candidates must also agree to be bound by the Certified Financial Planner Board's Standards of Professional Conduct. Anyone earning designation as a CFP® must complete 30 hours of continuing education every two years and renew the agreement to be bound by the Standards of Professional Conduct.

BROCHURE SUPPLEMENT

January 2, 2026

This brochure supplement provides information about John Joseph Heck that supplements the Avior Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Veronica LeDuc if you did not receive the Avior Wealth Management, LLC brochure or if you have any questions about the contents of this supplement.

Additional information about John Joseph Heck (CRD # 2434929) is available on the SEC's website at

www.adviserinfo.sec.gov.

John Joseph Heck

Avior Wealth Management, LLC

3200 Douglas Blvd., Suite 305

Roseville, CA 95661

Phone: (916) 367-4540

Educational Background and Business Experience

John Joseph Heck was born in 1967. Mr. Heck graduated in 1988 from Five Towns College, with an Associate's Degree in Music.

Mr. Heck has been a member and an Investment Advisor Representative of Avior Wealth Management, LLC since January 2026. Before joining Avior Wealth Management, the predecessor to Avior, he was employed as an investment advisor representative of EWG Elevate Inc. dba Protection Point Advisors from July 2020 through December 2025.

Disciplinary Information

John Joseph Heck has no disciplinary history that is required to be disclosed by the U.S. Securities and Exchange Commission or state regulatory authorities.

Other Business Activities

John Joseph Heck is also independently licensed as an insurance agent and may sell insurance products to clients and receive commissions when doing so. This is a potential conflict of interest, since commissions earned could be in addition to advisory fees earned in his capacity as an investment advisor representative. Clients are never obligated or required to purchase insurance products from or through John Joseph Heck and may select any independent insurance agent and insurance company to purchase insurance products. Regardless of the insurance agent selected, the insurance agent or agency will receive normal commissions from the sale.

John Joseph Heck spends all his work week on advisory matters.

Additional Compensation

John Joseph Heck does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Supervision

John Joseph Heck is a member of Avior Wealth Management, LLC. Veronica LeDuc, the Chief Compliance Officer, is responsible for developing, overseeing, and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives, including Mr. Heck. They may both be contacted at (402) 218-4064.

BROCHURE SUPPLEMENT

June 11, 2025

This brochure supplement provides information about Joshua Heiden that supplements the Avior Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Veronica LeDuc if you did not receive the Avior Wealth Management, LLC brochure or if you have any questions about the contents of this supplement.

Additional information about Joshua Heiden is available on the SEC's website at

www.adviserinfo.sec.gov.

Joshua Heiden CFP®

Avior Wealth Management, LLC

9901 IH-10 West, Suite 745
(Colonnade I Office Building)

San Antonio, TX 78230

Phone: (210) 822-5252

Educational Background and Business Experience

Joshua Heiden was born in 1987. Mr. Heiden graduated from University of Texas Pan-American in 2010 with a Bachelor of Business Administration Degree specializing in Finance. Joshua then attended Texas Tech University and received his Master's in Science of Personal Financial Planning. Joshua has worked at Avior Wealth Management since October of 2019. Previously, Joshua worked at USAA Investment Management Company from February 2013 to September 2019 as a Financial Advisor. Prior to working at USAA and while attending Texas Tech University, Joshua substitute taught for Lubbock ISD. While Joshua attended University of Texas Pan-American, he worked for the law firm Atlas & Hall in their bookkeeping department and filing department.

Disciplinary Information

Joshua Heiden has no disciplinary history that is required to be disclosed by the U.S. Securities and Exchange Commission or state regulatory authorities.

Other Business Activities

Joshua Heiden is also independently licensed as an insurance agent and may sell insurance products to clients and receive commissions when doing so. This is a potential conflict of interest, since commissions earned could be in addition to advisory fees earned in his capacity as an investment advisor representative. Clients are never obligated or required to purchase insurance products from or through Joshua Heiden and may select any independent insurance agent and insurance company to purchase insurance products. Regardless of the insurance agent selected, the insurance agent or agency will receive normal commissions from the sale.

Joshua Heiden has assisted and helped his wife's family run Antler Oaks Lodge on the weekends in his spare time.

Mr. Heiden spends all his work week on advisory matters.

Additional Compensation

Joshua Heiden does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Supervision

Joshua Heiden is a member of Avior Wealth Management, LLC. Veronica LeDuc, the Chief Compliance Officer, is responsible for developing, overseeing, and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives, including Mr. Heiden. They may both be contacted at (402) 218-4064.

Professional Designation Disclosure

¹ The Certified Financial Planner™ (CFP®) designation is issued by the Certified Financial Planner Board of Standards, Inc. It is a voluntary certification recognized by the United States and other countries for its (1) high standard of professional education, (2) stringent code of conduct and standards of practice and (3) ethical requirements governing

professional engagements with clients. A candidate for designation must first obtain a bachelor's degree from an accredited college or university with courses that included financial planning subject areas (e.g., insurance planning, risk management, employee benefits planning, investment planning, income tax planning, retirement planning and estate planning). Candidates must also have at least 3 years of full-time personal financial planning experience, measured as 2,000 hours per year. CFP[®] candidates must pass a 2-day comprehensive examination designed to test their ability to correctly diagnose financial planning issues and apply their knowledge to real world circumstances. Candidates must also agree to be bound by the Certified Financial Planner Board's Standards of Professional Conduct. Anyone earning designation as a CFP[®] must complete 30 hours of continuing education every two years and renew the agreement to be bound by the Standards of Professional Conduct.

BROCHURE SUPPLEMENT

July 29, 2025

This brochure supplement provides information about Justin M. Reineke that supplements the Avior Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Veronica LeDuc if you did not receive the Avior Wealth Management, LLC brochure or if you have any questions about the contents of this supplement.

Additional information about Justin M. Reineke is available on the SEC's website at www.adviserinfo.sec.gov.

Justin M. Reineke

Avior Wealth Management, LLC
14301 FNB Pkwy, Suite 410
Omaha, NE 68154
Phone: (402) 218-4064

Educational Background and Business Experience

Justin M. Reineke graduated from Nebraska Wesleyan University with a Bachelor of Arts in 1999.

Prior to joining Avior in March of 2024, Mr. Reineke worked for UBS as a financial advisor since 2018. Prior to that, he was an advisor at Wells Fargo starting in 2007.

Disciplinary Information

Justin M. Reineke has no disciplinary history that is required to be disclosed by the U.S. Securities and Exchange Commission or state regulatory authorities.

Other Business Activities

Mr. Reineke spends all his work week on advisory matters.

Additional Compensation

Mr. Reineke does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Supervision

Justin M. Reineke is a member of Avior Wealth Management, LLC. Veronica LeDuc, the Chief Compliance Officer, is responsible for developing, overseeing, and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives, including Mr. Reineke. They may both be contacted at (402) 218-4064.

BROCHURE SUPPLEMENT

July 29, 2025

This brochure supplement provides information about Kent D. Kuhlmann that supplements the Avior Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Veronica LeDuc if you did not receive the Avior Wealth Management, LLC brochure or if you have any questions about the contents of this supplement.

Additional information about Kent D. Kuhlmann is available on the SEC's website at

www.adviserinfo.sec.gov.

Kent D. Kuhlmann

Avior Wealth Management, LLC
1455 First Street, Suite 216
Napa, CA 94559
Phone: (707) 238-0270

Educational Background and Business Experience

Kent D. Kuhlmann graduated from Foothill Jr. College in 1979 and from San Diego State University in 1982 with a Bachelor of Science in Business Administration. In 1998, he served as Vice President for Retirement Capital Strategies until 2011. From 2011 to 2016, Kuhlmann worked for Strategic Wealth Advisors Group as an Investment Advisor Representative. Additionally from 1999 to 2017 he worked with LPL Financial LLC as an Investment Advisor Representative and later as a Registered Representative. In 2010, he was the Founder/CEO/Wealth Advisor for Kuhlmann Associates Financial until 2021. Additionally, from 2017 to 2021, Kuhlmann worked for Cetera Advisor Networks LLC as a Registered Representative. In 2016, he was appointed as Investment Advisor Representative for CWM, LLC until the present. And in 2021 until Present, he served as a Wealth Advisor for Carson Wealth.

Disciplinary Information

Kent D. Kuhlmann has a compromise reported by Wells Fargo Bank in 2011. The original amount owed was \$820,000.00 and was satisfied/released.

Other Business Activities

Kent Kuhlmann is independently licensed to sell insurance and annuity products through various insurance companies. When acting in this capacity, Kent Kuhlmann will receive commissions for selling insurance and annuity products. Clients can choose any independent insurance agent and insurance company to purchase insurance products and are not obligated to purchase insurance products through Kent Kuhlmann. Regardless of the insurance agent selected, the insurance agent or agency receives normal commissions from the sale. The receipt of compensation and other potential incentive benefits creates an incentive to recommend products to clients. At the time of any recommendations Kent Kuhlmann will discuss the products, your needs and any compensation arrangements.

Additional Compensation

Mr. Kuhlmann does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Supervision

Kent D. Kuhlmann is a member of Avior Wealth Management, LLC. Veronica LeDuc, the Chief Compliance Officer, is responsible for developing, overseeing, and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives, including Mr. Kuhlmann. They may both be contacted at (402) 218-4064.

BROCHURE SUPPLEMENT

March 26, 2025

This brochure supplement provides information about Kevin T. Fix that supplements the Avior Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Veronica LeDuc if you did not receive the Avior Wealth Management, LLC brochure or if you have any questions about the contents of this supplement.

Additional information about Kevin T. Fix is available on the SEC's website at

www.adviserinfo.sec.gov.

Kevin T. Fix

Avior Wealth Management, LLC
3720 North High Street
Columbus, OH 43214
Phone: (614) 372-5430

Educational Background and Business Experience

Kevin Fix graduated from Miami University with a Bachelor of Science in Accounting and a Bachelor of Arts in International Studies. He also earned an MBA in Finance at the University of Chicago Booth School of Business and has completed various corporate training and executive education programs.

In addition, Fix became a Certified Public Accountant (CPA) in 1992, a Personal Financial Specialist (PFS) in 2013, and a Certified Financial Planner (CFP®) in 2023. Also, in 2011, Fix received his N.A.S.A.A Series 65 license (Investment Advisor's Law Exam, administered by FINRA).

Kevin Fix's prior business experience to Avior includes being the Senior Financial Advisor at Fullen Financial Group. Before that he was the owner of Newhaven Capital Advisors, LLC, as well as working for Ameritech Corporation / SBC Communications / AT&T Inc. as the VP Finance. Fix's other previous positions were Internal Audit Manager for CBI Industries, Inc. and Senior Auditor for Arthur Andersen & Co.

Disciplinary Information

Kevin Fix has no disciplinary history that is required to be disclosed by the U.S. Securities and Exchange Commission or state regulatory authorities.

Other Business Activities

Mr. Fix spends all his work week on advisory matters.

Additional Compensation

Kevin Fix does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Supervision

Kevin T. Fix is a managing member for Avior Wealth Management, LLC. Veronica LeDuc is responsible for developing, overseeing, and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives, including Mr. Fix. Ms. LeDuc may be contacted at (402) 218-4064.

BROCHURE SUPPLEMENT

July 29, 2025

This brochure supplement provides information about Klaus Steinke that supplements the Avior Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Veronica LeDuc if you did not receive the Avior Wealth Management, LLC brochure or if you have any questions about the contents of this supplement.

Additional information about Klaus Steinke is available on the SEC's website at

www.adviserinfo.sec.gov.

Klaus Steinke, CFP®

Avior Wealth Management, LLC

14301 FNB Pkwy, Suite 410

Omaha, NE 68154

Phone: (402) 403-1436

Educational Background and Business Experience

Mr. Steinke received an Associates in Management and finance from Metropolitan Community College and is BA in Leadership from Bellevue University. Mr. Steinke has attained the designation as a Certified Financial Planner™ (CFP®).

Before joining Avior Wealth Management, LLC., Mr. Steinke worked at Silver Oak Securities. Prior to that, Mr. Steinke worked in the financial industry since 2006 with various firms.

Disciplinary Information

Mr. Steinke has one reportable event from a disciplinary perspective related to a client dispute that was settled in 2014 by his former firm. Mr. Steinke's former firm settled the client dispute without his knowledge, but this is required to be disclosed by the U.S. Securities and Exchange Commission or state regulatory authorities

Other Business Activities

Mr. Steinke spends all his work week on advisory matters.

Additional Compensation

Mr. Steinke does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Supervision

Klaus Steinke is a member of Avior Wealth Management, LLC. Veronica LeDuc, the Chief Compliance Officer, is responsible for developing, overseeing and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives, including Mr. Steinke. They may both be contacted at (402) 218-4064.

Professional Designation Disclosure

¹ The Certified Financial Planner™ (CFP®) designation is issued by the Certified Financial Planner Board of Standards, Inc. It is a voluntary certification recognized by the United States and other countries for its (1) high standard of professional education, (2) stringent code of conduct and standards of practice and (3) ethical requirements governing professional engagements with clients. A candidate for designation must first obtain a bachelor's degree from an accredited college or university with courses that included financial planning subject areas (e.g., insurance planning, risk management, employee benefits planning, investment planning, income tax planning, retirement planning and estate planning). Candidates must also have at least 3 years of full-time personal financial planning experience, measured as 2,000 hours per year. CFP® candidates must pass a comprehensive examination designed to test their ability to correctly diagnose financial planning issues and apply their knowledge to real world circumstances. Candidates must also agree to be bound by the Certified Financial Planner Board's Standards of Professional Conduct. Anyone earning designation as a CFP® must complete 30 hours of continuing education every two years and renew the agreement to be bound by the Standards of Professional Conduct.

BROCHURE SUPPLEMENT

March 26, 2025

This brochure supplement provides information about Kurt R. Cretors that supplements the Avior Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Veronica LeDuc if you did not receive the Avior Wealth Management, LLC brochure or if you have any questions about the contents of this supplement.

Additional information about Kurt R. Cretors is available on the SEC's website at

www.adviserinfo.sec.gov.

Kurt R. Cretors

Avior Wealth Management, LLC
14648 N. Scottsdale Rd, Suite 300
Scottsdale, AZ 85254
Phone: 480.391.9091

Educational Background and Business Experience

Kurt R. Cretors earned a Masters of Business Administration in Finance from Arizona State University - W.P. Carey School of Business in 1989. Mr. Cretors also earned a Bachelor of Science in Economics from University of California, San Diego in 1986.

Disciplinary Information

Mr. Cretors has no disciplinary history that is required to be disclosed by the U.S. Securities and Exchange Commission or state regulatory authorities.

Other Business Activities

Optimized Business Transitions, LLC

This consulting company is owned by Kurt and Sharlee Cretors. Optimized Business Transitions LLC specializes in assisting business owners with understanding their options for business transition and coordinating this transition process with the other members of their advisory team. The fees for these services are quoted and received separate from any fees as they relate to services rendered by Avior Wealth Management LLC, or any of its other subsidiaries. Mr. Cretors spends approximately 20% of his time per month on this activity.

Additional Compensation

Mr. Cretors has an additional business activity where compensation is received which is detailed above under Other Business Activities.

Supervision

Kurt Cretors is a member of Avior Wealth Management, LLC. Veronica LeDuc, the Chief Compliance Officer, is responsible for developing, overseeing and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives, including Mr. Cretors. They may both be contacted at (402) 218-4064.

Brochure Supplement

July 29, 2025

This brochure supplement provides information about Kyle Stewart Spitzenberger that supplements the Avior Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Veronica LeDuc if you did not receive the Avior Wealth Management, LLC brochure or if you have any questions about the contents of this supplement.

Additional information about Kyle Stewart Spitzenberger is available on the SEC's website at

www.adviserinfo.sec.gov.

Kyle Stewart Spitzenberger CFP®

14301 FNB Pkwy, Suite 410
Omaha, NE 68154

Phone: (402) 218-4064

Educational Background and Business Experience

Kyle Spitzenberger was born in 2000 and graduated from Creighton University with a bachelor's degree in Finance.

Prior to working with Avior, Spitzenberger worked with Mutual of Omaha in 2022. Before that he worked with Orion Advisor Technology in 2020, and National Indemnity Company and Servpro Northeast Wichita in 2019.

Disciplinary Information

Kyle Spitzenberger has no disciplinary history that is required to be disclosed by the U.S. Securities and Exchange Commission or state regulatory authorities.

Other Business Activities

Mr. Spitzenberger spends all his work week on advisory matters.

Additional Compensation

Kyle Spitzenberger does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Supervision

Kyle Stewart Spitzenberger is a member of Avior Wealth Management, LLC. Veronica LeDuc, the Chief Compliance Officer, is responsible for developing, overseeing and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives, including Mr. Spitzenberger. They may both be contacted at (402) 218-4064.

Professional Designation Information

1. The Certified Financial Planner™ (CFP®) designation is issued by the Certified Financial Planner Board of Standards, Inc. It is a voluntary certification recognized by the United States and other countries for its (1) high standard of professional education, (2) stringent code of conduct and standards of practice and (3) ethical requirements governing professional engagements with clients. A candidate for designation must first obtain a bachelor's degree from an accredited college or university with courses that included financial planning subject areas (e.g., insurance planning, risk management, employee benefits planning, investment planning, income tax planning, retirement planning and estate planning). Candidates must also have at least 3 years of full-time personal financial planning experience, measured as 2,000 hours per year. CFP® candidates must pass a 2-day comprehensive examination designed to test their ability to correctly diagnose financial planning issues and apply their knowledge to real world circumstances. Candidates must also agree to be bound by the Certified Financial Planner Board's Standards of Professional Conduct. Anyone earning designation as a CFP® must complete 30 hours of continuing education every two years and renew the agreement to be bound by the Standards of Professional Conduct.

BROCHURE SUPPLEMENT

March 26, 2025

This brochure supplement provides information about Lee S. Martin that supplements the Avior Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Veronica LeDuc if you did not receive the Avior Wealth Management, LLC brochure or if you have any questions about the contents of this supplement.

Additional information about Lee S. Martin is available on the SEC's website at www.adviserinfo.sec.gov.

Lee S. Martin

Avior Wealth Management, LLC
9725 SE 36th Street, Suite 404
Mercer Island, WA 98040
Phone: (425) 238-1300

Educational Background and Business Experience

Lee S. Martin was born in 1957 and graduated from Cal Poly San Luis Obispo with a Bachelor of Science in 1982. He obtained his Masters of Science from Seattle Pacific University in 1985. Prior to joining Avior, he has worked as an independent registered investment advisor with Financial Advocated Investment Management, LLC since 2013 as well as a registered representative with LPL Financial since 2010. Mr. Martin has also worked with Financial Advocated Advisory Service from 2010 to 2013 and with NRP Financial from 2009 to 2010. Prior to this, Mr. Martin worked with Allstate Financial Services, FSC Securities Corporation and Interstate, Inc.

Disciplinary Information

Lee S. Martin has no disciplinary history that is required to be disclosed by the U.S.

Securities and Exchange Commission or state regulatory authorities.\

Other Business Activities

Lee S. Martin is also independently licensed as an insurance agent and may sell insurance products to clients and receive commissions when doing so. This is a potential conflict of interest, since commissions earned could be in addition to advisory fees earned in his capacity as an investment advisor representative. Clients are never obligated or required to purchase insurance products from or through Britt Campbell and may select any independent insurance agent and insurance company to purchase insurance products. Regardless of the insurance agent selected, the insurance agent or agency will receive normal commissions from the sale.

Mr. Martin spends all of his work week on client advisory matters.

Additional Compensation

Lee S. Martin does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Supervision

Lee S. Martin is a member of Avior Wealth Management, LLC. Veronica LeDuc, the Chief Compliance Officer, is responsible for developing, overseeing, and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives, including Mr. Martin. They may both be contacted at (402) 218-4064.

BROCHURE SUPPLEMENT

March 26, 2025

This brochure supplement provides information about Mark Pogreba that supplements the Avior Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Veronica LeDuc if you did not receive the Avior Wealth Management, LLC brochure or if you have any questions about the contents of this supplement.

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

Mark Pogreba

Avior Wealth Management, LLC
14301 First National Bank Parkway, Suite 410
Omaha, Nebraska 68154
Phone: (402) 218-4064

Educational Background and Business Experience

Mr. Pogreba attended the California State University at Northridge and graduated in 1989 with a Bachelor of Science in Business Administration. Mr. Pogreba attained the designation as a Certified Financial Planner™ (CFP®) in October 1994.

Mr. Pogreba worked at Silverleaf Advisor Group, LLC before joining Avior Wealth Management, LLC. Prior to that, Mr. Pogreba worked at Nelson Van Denburg and Campbell Wealth Management Group, LLC, the predecessor to Avior. He has also worked at Raymond James Financial Services Advisors, Inc.

Disciplinary Information

Mr. Pogreba, upon leaving Silverleaf Advisor Group, LLC, has been cited for internal violations of policy which are more fully described in his U-5 filings obtainable via BrokerCheck. Mr. Pogreba denies these violations and no formal action has been initiated against Mr. Pogreba.

Other Business Activities

Mr. Pogreba spends all his work week on advisory matters.

Mr. Pogreba is also independently licensed as an insurance agent and may sell insurance products to clients and receive commissions when doing so. This is a potential conflict of interest, since commissions earned could be in addition to advisory fees earned in his capacity as an investment advisor representative. Clients are never obligated or required to purchase insurance products from or through Mr. Pogreba and may select any independent insurance agent and insurance company to purchase insurance products. Regardless of the insurance agent selected, the insurance agent or agency will receive normal commissions from the sale.

Additional Compensation

Mark Pogreba does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Supervision

Mark Pogreba is a managing member for Avior Wealth Management, LLC. Veronica LeDuc is responsible for developing, overseeing, and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives, including Mr. Pogreba. Ms. LeDuc may be contacted at (402) 218-4064.

BROCHURE SUPPLEMENT

January 2, 2026

This brochure supplement provides information about Mark Jon Wyhlidko that supplements the Avior Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Veronica LeDuc if you did not receive the Avior Wealth Management, LLC brochure or if you have any questions about the contents of this supplement.

Additional information about Mark Jon Wyhlidko (CRD # 2920675) is available on the SEC's website at

www.adviserinfo.sec.gov.

Mark Jon Wyhlidko

Avior Wealth Management, LLC

3200 Douglas Blvd., Suite 305

Roseville, CA 95661

Phone: (916) 367-4540

Educational Background and Business Experience

Mark Jon Wyhlidko was born in 1970. Mr. Wyhlidko graduated from CSU Sacramento in 1996 with a BS in Business Administration Finance.

Mr. Wyhlidko has been a member and an Investment Advisor Representative of Avior Wealth Management, LLC since January 2026. Before joining Avior Wealth Management, the predecessor to Avior, he was employed as an investment advisor representative of EWG Elevate Inc., dba Eagle West Group dba Protection Point Advisors from February 2019 through December 2025.

Disciplinary Information

Mark Jon Wyhlidko has no disciplinary history that is required to be disclosed by the U.S. Securities and Exchange Commission or state regulatory authorities.

Other Business Activities

Mark Jon Wyhlidko spends all his work week on advisory matters.

Additional Compensation

Mark Jon Wyhlidko does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Supervision

Mark Jon Wyhlidko is a member of Avior Wealth Management, LLC. Veronica LeDuc, the Chief Compliance Officer, is responsible for developing, overseeing, and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives, including Mr. Wyhlidko. They may both be contacted at (402) 218-4064.

BROCHURE SUPPLEMENT

January 2, 2026

This brochure supplement provides information about Michael Clark that supplements the Avior Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Veronica LeDuc if you did not receive the Avior Wealth Management, LLC brochure or if you have any questions about the contents of this supplement.

Additional information about Michael Clark (CRD # 6696212) is available on the SEC's website at

www.adviserinfo.sec.gov.

Michael Clark

Avior Wealth Management, LLC

3200 Douglas Blvd., Suite 305

Roseville, CA 95661

Phone: (916) 367-4540

Educational Background and Business Experience

Michael Clark was born in 1975. Mr. Clark graduated from Washington State University in 2000 with a BS, and from Westminster College in 2015 with an MBA.

Mr. Clark has been a member and an Investment Advisor Representative of Avior Wealth Management, LLC since January 2026. Before joining Avior Wealth Management, the predecessor to Avior, he was employed as an investment advisor representative of Advisor WG Elevate Inc., dba Protection Point Advisors from October 2020 through December 2025.

Disciplinary Information

Michael Clark has no disciplinary history that is required to be disclosed by the U.S. Securities and Exchange Commission or state regulatory authorities.

Other Business Activities

Michael Clark is also independently licensed as an insurance agent and may sell insurance products to clients and receive commissions when doing so. This is a potential conflict of interest, since commissions earned could be in addition to advisory fees earned in his capacity as an investment advisor representative. Clients are never obligated or required to purchase insurance products from or through Michael Clark and may select any independent insurance agent and insurance company to purchase insurance products. Regardless of the insurance agent selected, the insurance agent or agency will receive normal commissions from the sale.

Michael Clark spends all his work week on advisory matters.

Additional Compensation

Michael Clark does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Supervision

Michael Clark is a member of Avior Wealth Management, LLC. Veronica LeDuc, the Chief Compliance Officer, is responsible for developing, overseeing, and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives, including Mr. Clark. They may both be contacted at (402) 218-4064.

BROCHURE SUPPLEMENT

January 2, 2026

This brochure supplement provides information about Michael Clarke that supplements the Avior Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Veronica LeDuc if you did not receive the Avior Wealth Management, LLC brochure or if you have any questions about the contents of this supplement.

Additional information about Michael Clarke (CRD # 2423988) is available on the SEC's website at

www.adviserinfo.sec.gov.

Michael Clarke, CLU®

Avior Wealth Management, LLC

3200 Douglas Blvd., Suite 305

Roseville, CA 95661

Phone: (916) 367-4540

Educational Background and Business Experience

Michael Clarke was born in 1959. Mr. Clarke graduated from Santa Rosa Junior College in 1983 with an AA in Humanities. Mr. Clarke has attained the designation as a CLU®, Chartered Life Underwriter®.

Mr. Clarke has been a member and an Investment Advisor Representative of Avior Wealth Management, LLC since January 2026. Before joining Avior Wealth Management, the

predecessor to Avior, he was employed as an investment advisor representative of EWG Elevate Inc., dba Protection Point Advisors from October 2018 through December 2025.

Disciplinary Information

Michael Clarke has no disciplinary history that is required to be disclosed by the U.S. Securities and Exchange Commission or state regulatory authorities.

Other Business Activities

Michael Clarke is also independently licensed as an insurance agent and may sell insurance products to clients and receive commissions when doing so. This is a potential conflict of interest, since commissions earned could be in addition to advisory fees earned in his capacity as an investment advisor representative. Clients are never obligated or required to purchase insurance products from or through Michael Clarke and may select any independent insurance agent and insurance company to purchase insurance products. Regardless of the insurance agent selected, the insurance agent or agency will receive normal commissions from the sale.

Michael Clarke is also owner of a rental property.

Additional Compensation

Michael Clarke does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Supervision

Michael Clarke is a member of Avior Wealth Management, LLC. Veronica LeDuc, the Chief Compliance Officer, is responsible for developing, overseeing, and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives, including Mr. Clarke. They may both be contacted at (402) 218-4064.

Professional Designation Disclosure

CLU®- Chartered Life Underwriter®

MINIMUM QUALIFICATIONS:

- o Once fulfilling the ChFC® designation, one may also earn the CLU® designation by completing a minimum of three additional courses.
- o For the CLU®, one must complete the remaining core courses and select from the electives list for that program if additional courses are still needed; electives in the ChFC® program may not be used as electives in the CLU® program.

BROCHURE SUPPLEMENT

July 29, 2025

This brochure supplement provides information about Michael Pflueger that supplements the Avior Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Veronica LeDuc if you did not receive the Avior Wealth Management, LLC brochure or if you have any questions about the contents of this supplement.

Additional information about Michael Pflueger is available on the SEC's website at

www.adviserinfo.sec.gov

Michael Pflueger

Avior Wealth Management, LLC

14301 First National Bank Parkway, Suite 410

Omaha, Nebraska 68154

Phone: (402) 218-4064

Educational Background and Business Experience

Mr. Pflueger attended the University of Nebraska and graduated in 2002 with a Bachelor of Science – Criminal Justice and a concentration in Political Science.

Mr. Pflueger worked at Edward Jones Investments before joining Avior Wealth Management, LLC in May of 2021. Previously, he also worked at Cintas and FedEx.

Disciplinary Information

Michael Pflueger has no disciplinary history that is required to be disclosed by the U.S. Securities and Exchange Commission or state regulatory authorities.

Other Business Activities

Mr. Pflueger spends all his work week on advisory matters. Mr. Pflueger is a member of the Omaha Westside Lions Club, a member of the Omaha Business Coalition, a member of the Millard Business Association and a Board member for Radio Talking Book Service.

Additional Compensation

Michael Pflueger does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Supervision

Michael Pflueger is a member of Avior Wealth Management, LLC. Veronica LeDuc, the Chief Compliance Officer, is responsible for developing, overseeing, and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives, including Mr. Pflueger. They may both be contacted at (402) 218-4064.

BROCHURE SUPPLEMENT

March 26, 2025

This brochure supplement provides information about Michael P. Skolnick that supplements the Avior Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Veronica LeDuc if you did not receive the Avior Wealth Management, LLC brochure or if you have any questions about the contents of this supplement.

Additional information about Michael P. Skolnick is available on the SEC's website at www.adviserinfo.sec.gov.

Michael P. Skolnick

Avior Wealth Management, LLC
750 B Street, Suite 1610
San Diego, CA 92101
Phone: (800) 836-4792

Educational Background and Business Experience

Michael Skolnick graduated from the University of California in 1988 with a Bachelor of Arts in Economics. In 1992, he became licensed as a Certified Public Accountant.

Along with Michael's degree and license, he has received his Series 65 License and his Professional Financial Specialist (PFS) designation.

Before working with Avior, Michael worked at Axiom Advisory, LLC since 2014 as its President, Managing Member and Chief. Prior to that, from 2010 – 2014, he was Axiom's Sole Proprietor and Chief Compliance.

Disciplinary Information

Skolnick has no disciplinary history that is required to be disclosed by the U.S. Securities and Exchange Commission or state regulatory authorities.

Other Business Activities

Michael Skolnick is a member of the Alliance of Comprehensive Planners (ACP). This non-profit organization provides training and support through an alliance of fee-only

comprehensive financial advisors. As a member of the ACP, Michael has the right to use proprietary products and systems designed by the ACP. The ACP offers education in the form of in-person, web- and tele-conferences (which may provide continuing education credits) and services produced by collaborative efforts of the fee-only financial advisors.

Skolnick is also a member of the National Association of Personal Financial Advisors (NAPFA), which requires that its members are fee-only and obtain a minimum of 60 continuing education credits every two years.

Michael is a licensed Certified Public Accountant ("CPA"). In such capacity, he may also provide income tax preparation services through his comprehensive asset management service. These services are only offered to clients who have an executed advisory agreement with Avior Wealth Management, LLC. The fees for these services are included as part of the client's advisory fees. Mr. Skolnick does not offer tax preparation services outside of his advisory service. The client has the option of engaging Mr. Skolnick for tax preparation services.

Additional Compensation

Mr. Skolnick does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Supervision

Michael P. Skolnick is a member of Avior Wealth Management, LLC. Veronica LeDuc, the Chief Compliance Officer, is responsible for developing, overseeing, and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives, including Mr. Skolnick. They may both be contacted at (402) 218-4064.

BROCHURE SUPPLEMENT

January 2, 2026

This brochure supplement provides information about Michael John Welker that supplements the Avior Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Veronica LeDuc if you did not receive the Avior Wealth Management, LLC brochure or if you have any questions about the contents of this supplement.

Additional information about Michael John Welker (CRD # 4139776) is available on the SEC's website at

www.adviserinfo.sec.gov.

Michael John Welker

Avior Wealth Management, LLC

Office:

3200 Douglas Blvd., Suite 305

Roseville, CA 95661

Phone: (916) 367-4540

Educational Background and Business Experience

Michael John Welker was born in 1970. Mr. Welker graduated from Brigham Young University in 1995 with a BS, and from Texas State University in 1996 with an MS.

Mr. Welker has been an Investment Advisor Representative of Avior Wealth Management, LLC since January 2026. Before joining Avior Wealth Management, he was employed as an investment advisor representative of Advisor WG Elevate Inc., dba Protection Point Advisors from October 2020 through December 2025.

Disciplinary Information

Michael John Welker has no disciplinary history that is required to be disclosed by the U.S. Securities and Exchange Commission or state regulatory authorities.

Other Business Activities

Michael John Welker is also independently licensed as an insurance agent and may sell insurance products to clients and receive commissions when doing so. This is a potential conflict of interest, since commissions earned could be in addition to advisory fees earned in his capacity as an investment advisor representative. Clients are never obligated or required to purchase insurance products from or through Michael John Welker and may select any independent insurance agent and insurance company to purchase insurance products. Regardless of the insurance agent selected, the insurance agent or agency will receive normal commissions from the sale. He may also receive compensation from Avior Wealth Management LLC for training or educational services provided within the company or to prospective advisors and agents.

Michael John Welker spends most of his work week on advisory matters.

Additionally, Michael John Welker spends a few hours each week as an enumerator for the US Census Bureau, assisting in the collection of vital data used in local and national economic studies (including unemployment and other work related economic data).

Michael John Welker is also independently licensed as a mortgage originator and may occasionally sell residential mortgage products to clients as an ancillary benefit and receive commissions when doing so. This is a potential conflict of interest, since commissions earned could be in addition to advisory fees earned in his capacity as an investment advisor representative. Clients are never obligated or required to purchase residential mortgage products from or through Michael John Welker and may select any independent mortgage originator and bank lending company to purchase mortgage products. Regardless of the mortgage originator selected, the mortgage originator or bank lender will receive normal commissions from the sale.

Michael John Welker spends a few hours each month as a contractor of Legally Mine LLC. This company specializes in asset protection, tax strategies and estate planning. This is a potential conflict of interest, since commissions earned could be in addition to advisory fees earned in his capacity as an investment advisor representative. Clients are never obligated or required to purchase services from or through Michael John Welker and may select any independent representative to acquire those services offered by Legally Mine.

Additional Compensation

Michael John Welker does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Supervision

Michael John Welker is a member of Avior Wealth Management, LLC. Veronica LeDuc, the Chief Compliance Officer, is responsible for developing, overseeing, and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives, including Mr. Welker. They may both be contacted at (402) 218-4064.

BROCHURE SUPPLEMENT

March 26, 2025

This brochure supplement provides information about Dr. Mary Kathryn (“MK”) Campion that supplements the Avior Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Veronica LeDuc if you did not receive the Avior Wealth Management, LLC brochure or if you have any questions about the contents of this supplement.

Additional information about Dr. Mary Kathryn (“MK”) Campion is available on the SEC’s website at

www.adviserinfo.sec.gov.

Dr. Mary Kathryn (“MK”) Campion

Avior Wealth Management, LLC

510 Bering, Suite 240

Houston, TX 77057

Phone: (713) 974-8883

Educational Background and Business Experience

Mary Kathryn Campion was President and Chief Compliance Officer for Champion Capital Research, Inc., from 2003 until December 31, 2023. From 2007 until December 31, 2023, Campion served as Adjunct Faculty for the Center for Fiduciary Studies. She graduated from Rice University with a Bachelor degree and from the University of Houston with a Masters and Ph.D. degrees. Additionally, Campion is a Chartered Financial Analyst (CFA), Accredited Investment Fiduciary Auditor (AIFA), and Board Certified Fiduciary (BCF). Campion’s business experience started in 1998 where she was a Registered Representative for Century Securities Associates, Inc. until 2000. Also from 2000 to 2008, she was a Consultant and Registered Representative for Coastal Securities, L.P. From 2002 to 2004, she was an Investment Strategist for West Hills Institutional, and then served as Chief Investment Officer from 2004 to 2006 for U.S. Fiduciary Services.

Disciplinary Information

Dr. Mary Kathryn ("MK") Campion has no disciplinary history that is required to be disclosed by the U.S. Securities and Exchange Commission or state regulatory authorities.

Other Business Activities

Dr. Campion spends all her work week on advisory matters.

Additional Compensation

Dr. Mary Kathryn Campion does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Supervision

Dr. Mary Kathryn Campion is a member of Avior Wealth Management, LLC. Veronica LeDuc, the Chief Compliance Officer, is responsible for developing, overseeing, and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives, including Dr. Campion. They may both be contacted at (402) 218-4064.

BROCHURE SUPPLEMENT

March 26, 2025

This brochure supplement provides information about Morris Monroe that supplements the Avior Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Veronica LeDuc if you did not receive the Avior Wealth Management, LLC brochure or if you have any questions about the contents of this supplement.

Additional information about Morris Monroe is available on the SEC's website at

www.adviserinfo.sec.gov.

Morris Monroe

Avior Wealth Management, LLC
10655 Six Pines Drive, Ste. 100
The Woodlands, Texas 77380
(281) 367-2483

Educational Background and Business Experience

Mr. Monroe graduated from Sam Houston State University with a BBA in Finance.

Before joining Avior Wealth Management, LLC., Mr. Monroe owned Woodlands Asset Management, Inc., Woodlands Financial Services, and Navigator Securities Limited.

Disciplinary Information

Mr. Monroe has no disciplinary history that is required to be disclosed by the U.S. Securities

and Exchange Commission or state regulatory authorities.

Other Business Activities

Mr. Monroe spends all his work week on financial matters.

Mr. Monroe is affiliated with a broker/dealer, Momentum Independent Network (MIN), member FINRA/SIPC. Because other compensation is received from the broker/dealer, there may be an incentive to recommend investment products based upon the compensations received rather than on the client's needs. However, Avior discloses to clients this conflict and other compensation in both the ADV Part 2A and Part 2B. To mitigate this conflict, the type of advice given by Mr. Monroe to Avior clients differs from the transaction-based advice given to clients of MIN. There are also investment products not offered by Avior and therefore transacted through MIN. Avior maintains policies and procedures to address this conflict of interest and to ensure mitigation, when possible. Avior and MIN are not affiliated entities.

Mr. Monroe, through MIN, has sponsored limited partnerships or private offerings that are offered to MIN clients who may also be clients of Avior. In addition, Mr. Morris is affiliate with the General Partner of certain limited partnership.

Mr. Monroe is independently licensed as an insurance agent and may sell insurance products to clients and receive commissions when doing so. This is a potential conflict of interest, since commissions earned could be in addition to advisory fees earned in his capacity as an investment advisor representative. Clients are never obligated or required to purchase insurance products from or through Mr. Monroe and may select any independent insurance agent and insurance company to purchase insurance products. Regardless of the insurance agent selected, the insurance agent or agency will receive normal commissions from the sale.

Additional Compensation

Mr. Monroe, as registered representative of Momentum Independent Network, received commissions and trailing fees from the sale of mutual funds and other securities or investment products. In addition, he receives a salary as an employee of Avior Wealth Management. This poses the same conflicts as stated in "Other Business Activities".

Supervision

Morris Monroe is a member of Avior Wealth Management, LLC. Veronica LeDuc, the Chief Compliance Officer, is responsible for developing, overseeing and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives, including Mr. Monroe. They may both be contacted at (402) 218-4064.

BROCHURE SUPPLEMENT

March 26, 2025

This brochure supplement provides information about Nathanael M. Hahm that supplements the Avior Wealth Management, LLC brochure.

You should have received a copy of that brochure. Please contact Veronica LeDuc if you did not receive the Avior Wealth Management, LLC brochure or if you have any questions about the contents of this supplement.

Additional information about Nathanael M. Hahm is available on the SEC's website at

www.adviserinfo.sec.gov.

Nathanael M. Hahm

Avior Wealth Management, LLC

11100 Wayzata Blvd. Suite 210

Minnetonka, MN 55305

Phone (763) 542-2884

Educational Background and Business Experience

Mr. Hahm attended Minnesota State University in Mankato and graduated with a degree in Finance. Mr. Hahm attained the designation as a Certified Financial Planner™ (CFP®) in 2009. He obtained his National Social Security Advisor (NSSA®) certification in 2016. He completed his Masters of Science Degree in Personal Financial Planning through the College of Financial Planning in 2017. During that time he also attained his Master Planner Advance Study (MPAS®) designation through the College of Financial Planning.

Before joining Avior Wealth Management, LLC., Mr. Hahn worked for Lifestage Wealth Management since 2006.

Disciplinary Information

Mr. Hahm has no disciplinary history that is required to be disclosed by the U.S. Securities and Exchange Commission or state regulatory authorities.

Other Business Activities

Mr. Hahm spends all his work week on advisory matters.

Mr. Hahm is also independently licensed as an insurance agent and may sell insurance products to clients and receive commissions when doing so. This is a potential conflict of interest, since commissions earned could be in addition to advisory fees earned in his capacity as an investment advisor representative. Clients are never obligated or required to purchase insurance products from or through Mr. Hahm and may select any independent insurance agent and insurance company to purchase insurance products. Regardless of the insurance agent selected, the insurance agent or agency will receive normal commissions from the sale.

Additional Compensation

Mr. Hahm does not receive any economic benefit from a non-advisory client for the provision of advisory services except for insurance products as stated above.

Supervision

Nathanael Hahm is a member of Avior Wealth Management, LLC. Veronica LeDuc, the Chief Compliance Officer, is responsible for developing, overseeing and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives, including Mr. Hahm. They may both be contacted at (402) 218-4064.

Professional Designation Disclosure

¹ The Certified Financial Planner[™] (CFP[®]) designation is issued by the Certified Financial Planner Board of Standards, Inc. It is a voluntary certification recognized by the United States and other countries for its (1) high standard of professional education, (2) stringent code of conduct and standards of practice and (3) ethical requirements governing professional engagements with clients. A candidate for designation must first obtain a bachelor's degree from an accredited college or university with courses that included financial planning subject areas (e.g., insurance planning, risk management, employee benefits planning, investment planning, income tax planning, retirement planning and estate planning). Candidates must also have at least 3 years of full-time personal financial planning experience, measured as

2,000 hours per year. CFP[®] candidates must pass a comprehensive examination designed to test their ability to correctly diagnose financial planning issues and apply their knowledge to real world circumstances. Candidates must also agree to be bound by the Certified Financial Planner Board's Standards of Professional Conduct. Anyone earning designation as a CFP[®] must complete 30 hours of continuing education every two years and renew the agreement to be bound by the Standards of Professional Conduct.

BROCHURE SUPPLEMENT

July 29, 2025

This brochure supplement provides information about Nate Hudson that supplements the Avior Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Veronica LeDuc if you did not receive the Avior Wealth Management, LLC brochure or if you have any questions about the contents of this supplement.

Additional information about Nate Hudson is available on the SEC's website at

www.adviserinfo.sec.gov.

Nate Hudson CFP ®

Avior Wealth Management, LLC

14301 First National Bank Parkway, Suite 410

Omaha, Nebraska 68154

Phone: (402) 218-4064

Educational Background and Business Experience

Nate Hudson attended Creighton University and graduated with a Bachelors of Science in Business Administration, majoring in Finance. In May of 2020, Mr. Hudson attained the designation as a Certified Financial Planner™ (CFP®).

Mr. Hudson started working at Avior Wealth Management, LLC upon graduation in June of 2018.

Disciplinary Information

Nate Hudson has no disciplinary history that is required to be disclosed by the U.S. Securities and Exchange Commission or state regulatory authorities.

Other Business Activities

Nate Hudson spends all his work week on advisory matters.

Additional Compensation

Nate Hudson does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Supervision

Nate Hudson is a member of Avior Wealth Management, LLC. Veronica LeDuc, the Chief Compliance Officer, is responsible for developing, overseeing, and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives, including Mr. Hudson. They may both be contacted at (402) 218-4064.

Professional Designation Disclosure

¹ The Certified Financial Planner™ (CFP®) designation is issued by the Certified Financial Planner Board of Standards, Inc. It is a voluntary certification recognized by the United States and other countries for its (1) high standard of professional education, (2) stringent code of conduct and standards of practice and (3) ethical requirements governing professional engagements with clients. A candidate for designation must first obtain a bachelor's degree from an accredited college or university with courses that included financial planning subject areas (e.g., insurance planning, risk management, employee benefits planning, investment planning, income tax planning, retirement planning and estate planning). Candidates must also have at least 3 years of full-time personal financial planning experience, measured as 2,000 hours per year. CFP® candidates must pass a comprehensive examination designed to test their ability to correctly diagnose financial planning issues and apply their knowledge to real world circumstances. Candidates must also agree to be bound by the Certified Financial Planner Board's Standards of Professional Conduct. Anyone earning designation as a CFP® must complete 30 hours of continuing education every two years and renew the agreement to be bound by the Standards of Professional Conduct.

BROCHURE SUPPLEMENT

January 2, 2026

This brochure supplement provides information about Nathan Salimi that supplements the Avior Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Veronica LeDuc if you did not receive the Avior Wealth Management, LLC brochure or if you have any questions about the contents of this supplement.

Additional information about Nathan Salimi (CRD # 7834694) is available on the SEC's website at

www.adviserinfo.sec.gov.

Nathan Salimi

Avior Wealth Management, LLC

3200 Douglas Blvd., Suite 305

Roseville, CA 95661

Phone: (916) 367-4540

Educational Background and Business Experience

Nathan Salimi was born in 2000. Mr. Salimi graduated from Sonoma State in 2023 with a Bachelor's Degree in Finance. Mr. Salimi has been a member and an Investment Advisor Representative of Avior Wealth Management, LLC since January 2026. Before joining Avior Wealth Management, the predecessor to Avior, he was employed as an investment advisor representative of EWG Elevate Inc., dba Protection Point Advisors from November 2023 through December 2025.

Disciplinary Information

Nathan Salimi has no disciplinary history that is required to be disclosed by the U.S. Securities and Exchange Commission or state regulatory authorities.

Other Business Activities

Nathan Salimi spends all his work week on advisory matters.

Additional Compensation

Nathan Salimi does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Supervision

Nathan Salimi is a member of Avior Wealth Management, LLC. Veronica LeDuc, the Chief Compliance Officer, is responsible for developing, overseeing, and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives, including Mr. Salimi. They may both be contacted at (402) 218-4064.

BROCHURE SUPPLEMENT

January 2, 2026

This brochure supplement provides information about Patrick Salimi that supplements the Avior Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Veronica LeDuc if you did not receive the Avior Wealth Management, LLC brochure or if you have any questions about the contents of this supplement.

Additional information about Patrick Salimi (CRD # 7116061) is available on the SEC's website at

www.adviserinfo.sec.gov.

Patrick Salimi

Avior Wealth Management, LLC

3200 Douglas Blvd.

Roseville, CA 95661

(916) 761-8423

Educational Background and Business Experience

Patrick Salimi was born in 1972. Patrick Salimi has not received any higher education degrees since high school. Mr. Salimi has been a member and an Investment Advisor Representative of Avior Wealth Management, LLC since January 2026. Before joining Avior Wealth Management, the predecessor to Avior, he was employed as an investment advisor representative of EWG Elevate Inc., dba Protection Point Advisors from May 2019 through December 2025.

Disciplinary Information

Patrick Salimi has no disciplinary history that is required to be disclosed by the U.S. Securities and Exchange Commission or state regulatory authorities.

Other Business Activities

Patrick Salimi is also independently licensed as an insurance agent and may sell insurance products to clients and receive commissions when doing so. This is a potential conflict of interest, since commissions earned could be in addition to advisory fees earned in his capacity as an investment advisor representative. Clients are never obligated or required to purchase insurance products from or through Patrick Salimi and may select any independent insurance agent and insurance company to purchase insurance products. Regardless of the insurance agent selected, the insurance agent or agency will receive normal commissions from the sale.

Patrick Salimi is the President of Retireminting, Inc., a marketing consulting, and systems creation company for legal and investment firms.

Additional Compensation

Patrick Salimi does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Supervision

Patrick Salimi is a member of Avior Wealth Management, LLC. Veronica LeDuc, the Chief Compliance Officer, is responsible for developing, overseeing, and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives, including Mr. Salimi. They may both be contacted at (402) 218-4064.

BROCHURE SUPPLEMENT

January 2, 2026

This brochure supplement provides information about Richard Lee Watson that supplements the Avior Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Veronica LeDuc if you did not receive the Avior Wealth Management, LLC brochure or if you have any questions about the contents of this supplement.

Additional information about Richard Lee Watson (CRD # 2173329) is available on the SEC's website at

www.adviserinfo.sec.gov.

Richard Lee Watson CFP®

Avior Wealth Management, LLC

3200 Douglas Blvd., Suite 305

Roseville, CA 95661

Phone: (916) 367-4540

Educational Background and Business Experience

Richard Lee Watson was born in 1963. Mr. Watson graduated from University of C.A. Riverside in 1986, with a B.S in BioChemistry. Mr. Watson has attained the designation as a CFP®, CLU®, and ChFC®.

Mr. Watson has been a member and an Investment Advisor Representative of Avior Wealth Management, LLC since January 2026. Before joining Avior Wealth Management, the predecessor to Avior, he was employed as an investment advisor representative of EWG Elevate Inc., dba Eagle West Group dba Protection Point Advisors from October 2018 through December 2025.

Disciplinary Information

Richard Lee Watson has no disciplinary history that is required to be disclosed by the U.S. Securities and Exchange Commission or state regulatory authorities.

Other Business Activities

Richard Lee Watson is also independently licensed as an insurance agent and may sell insurance products to clients and receive commissions when doing so. This is a potential conflict of interest, since commissions earned could be in addition to advisory fees earned in his capacity as an investment advisor representative. Clients are never obligated or required to purchase insurance products from or through Richard Lee Watson and may select any independent insurance agent and insurance company to purchase insurance products. Regardless of the insurance agent selected, the insurance agent or agency will receive normal commissions from the sale.

Rick also is a member of PPA Invest Team, a fund management company that oversees the PPA Coliving fund 1, that is closed to new investors which is set to make a final distribution and return of principle to investors sometime 2026-2030.

Richard Lee Watson spends all his work week on advisory matters.

Additional Compensation

Richard Lee Watson does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Supervision

Richard Lee Watson is a member of Avior Wealth Management, LLC. Veronica LeDuc, the Chief Compliance Officer, is responsible for developing, overseeing, and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives, including Mr. Watson. They may both be contacted at (402) 218-4064.

Professional Designation Disclosure

CFP® - 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.

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 – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and

Ethics – Agree to be bound by CFP Board’s Standards of Professional 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:

Item 2: Educational Background and Business Experience

i. Continuing Education – Complete 30 hours of continuing education hours every two years, including two hours on the Code of Ethics and other parts of the Standards of Professional Conduct, to maintain competence and keep up with developments in the financial planning field; and

ii. Ethics – Renew an agreement to be bound by the Standards of Professional 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 CFP Board’s enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

Brochure Supplement

July 29, 2025

This brochure supplement provides information about Rodney W. Goben that supplements the Avior Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Veronica LeDuc if you did not receive the Avior Wealth Management, LLC brochure or if you have any questions about the contents of this supplement.

Additional information about Rodney W. Goben is available on the SEC's website at

www.adviserinfo.sec.gov.

Rodney W. Goben

Avior Wealth Management, LLC
14301 First National Bank Parkway, Suite 410
Omaha, Nebraska 68154
Phone: (402) 218-4064

Educational Background and Business Experience

Rodney W. Goben was born in 1960 and graduated from York College in 1982 with an associate degree in Liberal Arts. He has been an Investment Advisor Representative with Avior Wealth Management, LLC since March 2012. Before joining Avior Wealth Management, LLC, he was owner of Goben Financial Resources from 1989 to 2012. He was a Registered Representative with Purshe Kaplan Sterling Investments from March 2012 to November 2012. From February 2002 to May 2008, he was a Registered Representative with Sammons Securities Company, LLC and from May 2008 to February 2012 with Princor Financial Services Company.

Disciplinary Information

Rodney W. Goben has no disciplinary history that is required to be disclosed by the U.S. Securities and Exchange Commission or state regulatory authorities.

Other Business Activities

Mr. Goben is also independently licensed as an insurance agent and may sell insurance products to clients and receive commissions when doing so. This is a potential conflict of interest, since commissions earned could be in addition to advisory fees earned in his capacity as an investment advisor representative. Clients are never obligated or required to purchase insurance products from or through Mr. Goben and may select any independent insurance agent and insurance company to purchase insurance products. Regardless of the insurance agent selected, the insurance agent or agency will receive normal commissions from the sale.

Mr. Goben spends all his work week on client advisory matters and management of Avior's employees.

Additional Compensation

Rodney W. Goben does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Supervision

Rodney Goben is a member of Avior Wealth Management, LLC. Veronica LeDuc,, the Chief Compliance Officer, is responsible for developing, overseeing, and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives, including Mr. Goben. They may both be contacted at (402) 218-4064.

BROCHURE SUPPLEMENT

June 11, 2025

This brochure supplement provides information about Ryan S. Elkins that supplements the Avior Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Veronica LeDuc if you did not receive the Avior Wealth Management, LLC brochure or if you have any questions about the contents of this supplement.

Additional information about Ryan S Elkins is available on the SEC's website at

www.adviserinfo.sec.gov.

Ryan S. Elkins CFP®
Avior Wealth Management, LLC
9901 IH-10 West, Suite 745
(Colonnade I Office Building)
San Antonio, TX 78230
Phone: (210) 822-5252

Educational Background and Business Experience

Ryan S. Elkins established his career in personal finance in 2004. Ryan's professional career built upon his Bachelor of Science Field of Study in Business Administration from the University of Maryland and his master's in business administration from the University of Incarnate Word. Mr. Elkins has also obtained the designation as a Certified Financial

Planner™ (CFP®).¹

Ryan most recently worked with USAA Financial Advisors and before that Mr. Elkins was employed with Merrill Lynch, Ameriprise Financials Services, and IDS Life Insurance Company. In May 2019, he joined Nelson, Van Denburg & Campbell Wealth Management Group LLC, the predecessor to Avior Wealth Management LLC, as an Investment Advisor Representative to further serve clients through comprehensive financial planning.

Disciplinary Information

Ryan S. Elkins has no disciplinary history that is required to be disclosed by the U.S. Securities and Exchange Commission or state regulatory authorities.

Other Business Activities

Ryan Elkins is also independently licensed as an insurance agent and may sell insurance products to clients and receive commissions when doing so. This is a potential conflict of interest, since commissions earned could be in addition to advisory fees earned in his capacity as an investment advisor representative. Clients are never obligated or required to purchase insurance products from or through Ryan Elkins and may select any independent insurance agent and insurance company to purchase insurance products. Regardless of the insurance agent selected, the insurance agent or agency will receive normal commissions from the sale.

Mr. Elkins spends all his work week on advisory matters.

Additional Compensation

Ryan S. Elkins does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Supervision

Ryan Elkins is a member of Avior Wealth Management, LLC. Veronica LeDuc, the Chief Compliance Officer, is responsible for developing, overseeing, and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives, including Mr. Elkins. They may both be contacted at (402) 218-4064.

Professional Designation Disclosure

¹ The Certified Financial Planner™ (CFP®) designation is issued by the Certified Financial Planner Board of Standards, Inc. It is a voluntary certification recognized by the United States

and other countries for its (1) high standard of professional education, (2) stringent code of conduct and standards of practice and (3) ethical requirements governing professional engagements with clients. A candidate for designation must first obtain a bachelor's degree from an accredited college or university with courses that included financial planning subject areas (e.g., insurance planning, risk management, employee benefits planning, investment planning, income tax planning, retirement planning and estate planning). Candidates must also have at least 3 years of full-time personal financial planning experience, measured as 2,000 hours per year. CFP® candidates must pass a 2-day comprehensive examination designed to test their ability to correctly diagnose financial planning issues and apply their knowledge to real world circumstances. Candidates must also agree to be bound by the Certified Financial Planner Board's Standards of Professional Conduct. Anyone earning designation as a CFP® must complete 30 hours of continuing education every two years and renew the agreement to be bound by the Standards of Professional Conduct.

BROCHURE SUPPLEMENT

July 29, 2025

This brochure supplement provides information about Ryan McQuillan that supplements the Avior Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Veronica LeDuc if you did not receive the Avior Wealth Management, LLC brochure or if you have any questions about the contents of this supplement.

Additional information about Ryan McQuillan is available on the SEC's website at

www.adviserinfo.sec.gov.

Ryan McQuillan

Avior Wealth Management, LLC
14301 FNB Pkwy, Suite 410
Omaha, Nebraska 68154
(402) 218-4064

Educational Background and Business Experience

Mr. McQuillan obtained his Bachelor of Science in Business Administration with a concentration in Investment Science and Portfolio Management from the University of Nebraska at Omaha in 2009.

Before joining Avior Wealth Management, LLC., Ryan McQuillan worked for Prudential from 2013 through 2022, Farm Bureau Financial Services from March 2012 through August 2013 and started his career with Northwestern Mutual.

Disciplinary Information

Mr. McQuillan has no disciplinary history that is required to be disclosed by the U.S. Securities and Exchange Commission or state regulatory authorities.

Other Business Activities

Mr. McQuillan spends all his work week on advisory matters.

Mr. McQuillan is also independently licensed as an insurance agent and may sell insurance products to clients and receive commissions when doing so. This is a potential conflict of interest, since commissions earned could be in addition to advisory fees earned in his capacity as an investment advisor representative. Clients are never obligated or required to purchase insurance products from or through Mr. McQuillan and may select any independent insurance agent and insurance company to purchase insurance products. Regardless of the insurance agent selected, the insurance agent or agency will receive normal commissions from the sale.

Additional Compensation

Mr. McQuillan does not receive any other economic benefit from a non-advisory client for the provision of advisory services.

Supervision

Ryan McQuillan is a member of Avior Wealth Management, LLC. Veronica LeDuc, the Chief Compliance Officer, is responsible for developing, overseeing and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives, including Mr. McQuillan. They may both be contacted at (402) 218-4064.

BROCHURE SUPPLEMENT

March 26, 2025

This brochure supplement provides information about Sali Shamoun that supplements the Avior Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Veronica LeDuc if you did not receive the Avior Wealth Management, LLC brochure or if you have any questions about the contents of this supplement.

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

Sali Shamoun CFP®

Avior Wealth Management, LLC
750 B Street, Suite 1610
San Diego, CA 92101
Phone: (800) 836-4792

Educational Background and Business Experience

Sali Shamoun graduated from San Diego State University in 2015 with a Bachelor of Arts in Graphic Design. Along with Sali's degree, she has received her Series 65 License and her Certified Financial Planner™, CFP® designation.

Before working with Avior, Sali worked at Axiom Advisory, LLC since 2017 as an Investment Adviser Representative. From 2016 – 2017, she was a Customer Service Representative for Julie Haidao Insurance Agency.

Disciplinary Information

Sali has no disciplinary history that is required to be disclosed by the U.S. Securities and Exchange Commission or state regulatory authorities.

Other Business Activities

Sali Shamoun is a licensed insurance agent/broker. She may offer insurance products and receive customary fees as a result of insurance sales. A conflict of interest may arise as these insurance sales may create an incentive to recommend products based on the compensation earned. To mitigate this potential conflict, Sali Shamoun, as a fiduciary, will act in the client's

best interest. She will not, however, be offering insurance products nor will she receive customary fees as a result of insurance sales.

Additional Compensation

Mrs. Shamoun does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Supervision

Sali Shamoun is a member of Avior Wealth Management, LLC. Veronica LeDuc, the Chief Compliance Officer, is responsible for developing, overseeing, and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives, including Mrs. Shamoun. They may both be contacted at (402) 218-4064.

BROCHURE SUPPLEMENT

March 26, 2025

This brochure supplement provides information about Sandra Loewen that supplements the Avior Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Veronica LeDuc if you did not receive the Avior Wealth Management, LLC brochure or if you have any questions about the contents of this supplement.

Additional information about Sandra Loewen is available on the SEC's website at

www.adviserinfo.sec.gov.

Sandra Loewen, CFP®

Avior Wealth Management, LLC
2880 Cleveland Avenue, Suite 2
Santa Rosa, CA 95403
(707) 576-8700

Educational Background and Business Experience

Sandra Loewen received a Bachelor's Degree in Architecture from the University of Minnesota, Twin Cities. She also received an Account Clerk Certificate from the Santa Rosa Junior College. Sandra Loewen has attained the designation as a Certified Financial Planner™ (CFP®) as well as CTEC Registered Tax Preparer (CRTP)

Before joining Avior Wealth Management, LLC., Sandra Loewen worked at Montgomery Taylor & Company, LLC from 2009 through 2022.

Disciplinary Information

Sandra Loewen has no disciplinary history that is required to be disclosed by the U.S. Securities and Exchange Commission or state regulatory authorities.

Other Business Activities

Sandra Loewen also provides tax preparation services as part of the accounting firm, Avior Tax and Accounting, LLC, which is under common ownership of Avior Wealth Management, LLC.

Avior Tax and Accounting, LLC offers professional tax return preparation for individuals and business entities. Tax preparation fees are calculated based upon the firm's standard hourly rates plus out-of-pocket expenses. These fees are billed separately from fees payable to Avior Wealth Management, LLC for investment management and financial planning services. Clients of Avior Wealth Management, LLC may be offered a discount on tax preparation services; the discount percentage, if any, is determined by the overall relationship. Sandra Loewen spends approximately 20% of her time engaged in services related to Avior Tax and Accounting, LLC.

Additional Compensation

Sandra Loewen does not receive any other economic benefit from a non-advisory client for the provision of advisory services.

Supervision

Sandra Loewen is a member of Avior Wealth Management, LLC. Veronica LeDuc, the Chief Compliance Officer, is responsible for developing, overseeing and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives, including Ms. Loewen. They may both be contacted at (402) 218-4064.

Professional Designation Disclosure

¹ The Certified Financial Planner[™] (CFP[®]) designation is issued by the Certified Financial Planner Board of Standards, Inc. It is a voluntary certification recognized by the United States and other countries for its (1) high standard of professional education, (2) stringent code of conduct and standards of practice and (3) ethical requirements governing professional engagements with clients. A candidate for designation must first obtain a bachelor's degree from an accredited college or university with courses that included financial planning subject areas (e.g., insurance planning, risk management, employee benefits planning, investment planning, income tax planning, retirement planning and estate planning). Candidates must also have at least 3 years of full-time personal financial planning experience, measured as 2,000 hours per year. CFP[®] candidates must pass a comprehensive examination designed to test their ability to correctly diagnose financial planning issues and apply their knowledge to real world circumstances. Candidates must also agree to be bound by the Certified Financial Planner Board's Standards of Professional Conduct. Anyone earning designation as a CFP[®]

must complete 30 hours of continuing education every two years and renew the agreement to be bound by the Standards of Professional Conduct.

BROCHURE SUPPLEMENT

July 29, 2025

This brochure supplement provides information about Scott Cavey that supplements the Avior Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Veronica LeDuc if you did not receive the Avior Wealth Management, LLC brochure or if you have any questions about the contents of this supplement.

Additional information about Scott Cavey is available on the SEC's website at

www.adviserinfo.sec.gov.

Scott T. Cavey CFP ®

Avior Wealth Management, LLC
14301 First National Bank Parkway, Suite 410
Omaha, Nebraska 68154
Phone: (402) 218-4064

Educational Background and Business Experience

Scott T. Cavey was born in 1978. Mr. Cavey attended the University of Notre Dame and graduated with a degree in Business Administration. In 2006, Mr. Cavey attained the designation as a Certified Financial Planner™ (CFP®).

Mr. Cavey has been a member and an Investment Advisor Representative of Avior Wealth Management, LLC since April 2020. He entered the investment industry in 2000 with Paine Webber and has worked directly with clients ever since. From 2002 to 2004, he was employed through Edward Jones. From 2004 to 2011, he worked independently through QA3 Financial Corporation. Immediately prior to joining Nelson, Van Denburg & Campbell, the predecessor to Avior, he was an owner of Illuminate Financial Group, LLC, from 2011 to 2020.

Disciplinary Information

Scott T. Cavey has three disciplinary or disclosure events that are required to be and are disclosed with the Securities and Exchange Commission. In 2011, Mr. Cavey successfully defended an arbitration that was dismissed with prejudice. In 2015, a customer dispute was denied and successfully defended by Mr. Cavey. In 2016, a customer dispute was closed with no action against Mr. Cavey. In all three instances, Mr. Cavey successfully defended himself against the allegations with no findings of wrongdoing by Mr. Cavey.

Other Business Activities

Mr. Cavey is an owner of both Cavey Enterprises, Inc. and Cavey & Associates, LLC. Neither the firm's nor Mr. Cavey's clients are solicited or otherwise invited to participate in either business entity.

Mr. Cavey is a member of the Papillion Fire Department Local 3767 Pension Committee.

Scott Cavey is also independently licensed as an insurance agent and may sell insurance products to clients and receive commissions when doing so. This is a potential conflict of interest, since commissions earned could be in addition to advisory fees earned in his capacity as an investment advisor representative. Clients are never obligated or required to purchase insurance products from or through Scott Cavey and may select any independent insurance agent and insurance company to purchase insurance products. Regardless of the insurance agent selected, the insurance agent or agency will receive normal commissions from the sale.

Scott Cavey spends all his work week on advisory matters.

Additional Compensation

Scott Cavey does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Supervision

Scott Cavey is a managing member for Avior Wealth Management, LLC. Veronica LeDuc, the Chief Compliance Officer, is responsible for developing, overseeing, and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives, including Mr. Cavey. He may be contacted at (402) 218-4064.

Professional Designation Disclosure

¹ The Certified Financial Planner[™] (CFP[®]) designation is issued by the Certified Financial Planner Board of Standards, Inc. It is a voluntary certification recognized by the United States and other countries for its (1) high standard of professional education, (2) stringent code of conduct and standards of practice and (3) ethical requirements governing professional engagements with clients. A candidate for designation must first obtain a bachelor's degree from an accredited college or university with courses that included financial planning subject areas (e.g., insurance planning, risk management, employee benefits planning, investment planning, income tax planning, retirement planning and estate planning). Candidates must also have at least 3 years of full-time personal financial planning experience, measured as 2,000 hours per year. CFP[®] candidates must pass a 2-day comprehensive examination designed to test their ability to correctly diagnose financial planning issues and apply their knowledge to real world circumstances. Candidates must also agree to be bound by the Certified Financial Planner Board's Standards of Professional Conduct. Anyone earning designation as a CFP[®] must complete 30 hours of continuing education every two years and renew the agreement to be bound by the Standards of Professional Conduct.

BROCHURE SUPPLEMENT

June 11, 2025

This brochure supplement provides information about Roger Scott Sawtelle that supplements the Avior Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Veronica LeDuc if you did not receive the Avior Wealth Management, LLC brochure or if you have any questions about the contents of this supplement.

Additional information about Roger Scott Sawtelle is available on the SEC's website at

www.adviserinfo.sec.gov.

Roger Scott Sawtelle

Avior Wealth Management, LLC
9901 IH-10 West, Suite 745 (Colonnade I Office Building)
San Antonio, TX 78230
Phone: (210) 822-5252

Educational Background and Business Experience

Roger Scott Sawtelle was born in 1948 and graduated from the University of Texas at Austin with a degree in Psychology. Roger achieved the Chartered Financial Consultant® (ChFC) designation in 2000.

Roger Sawtelle has been an Investment Advisor Representative with Avior since March 2019. Before joining Avior, Roger Sawtelle was owner and Investment Advisor for Sawtelle Financial Management from August 1996 until March 2019. On March 31, 2019, Roger Sawtelle's firm, Sawtelle Financial Management, was acquired by Nelson, Van Denburg & Campbell Wealth Management LLC, the predecessor to Avior Wealth Management, LLC.

Disciplinary Information

Roger Scott Sawtelle has one disclosure from 1997, "Misrepresentation of a multiple employer welfare benefit plan funded by life insurance". A change in tax law created an issue with type of funding for employer retirement plans. The broker dealer settled the claim with the client and reported it to FINRA. This claim is insurance related, not securities related.

Other Business Activities

Roger Scott Sawtelle spends all his work week on advisory matters.

Additional Compensation

Roger S. Sawtelle does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Supervision

Roger Sawtelle is a member of Avior Wealth Management, LLC. Veronica LeDuc, the Chief Compliance Officer, is responsible for developing, overseeing and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives, including Mr. Sawtelle. They may both be contacted at (402) 218-4064.

Professional Designation Information

The Chartered Financial Consultant ®(ChFC®) is a professional designation that is granted by The American College upon completion of seven required courses and two elective courses (equivalent of 27 semester credit hours) followed by a proctored exam for each course. The curriculum to earn this designation is comprised of courses designed to provide training in understanding key elements in the financial planning world such as retirement planning, estate planning, insurance, investments, and income taxes, as well as practical application of the skills learned in real-life scenarios. A minimum of three years of full-time business experience within the five years preceding the designation is a prerequisite. Once the designation is earned, 30 continuing education credits are required every two years to maintain the credential.

BROCHURE SUPPLEMENT

March 26, 2025

This brochure supplement provides information about Sharlee L. Cretors that supplements the Avior Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Veronica LeDuc if you did not receive the Avior Wealth Management, LLC brochure or if you have any questions about the contents of this supplement.

Additional information about Sharlee L. Cretors is available on the SEC's website at

www.adviserinfo.sec.gov.

Sharlee L. Cretors CFP®

Avior Wealth Management, LLC
14648 N. Scottsdale Rd, Suite 300
Scottsdale, AZ 85254
Phone: 480.391.9091

Educational Background and Business Experience

Sharlee L. Cretors earned a Masters in Business Administration from Arizona State University - W.P. Carey School of Business in 1993. Ms. Cretors also earned a Bachelor of Arts from University of California, San Diego in 1988 and a Masters in Financial Planning from College of Denver in 2005.

Disciplinary Information

Ms. Cretors has no disciplinary history that is required to be disclosed by the U.S. Securities and Exchange Commission or state regulatory authorities.

Other Business Activities

Optimized Business Transitions, LLC

This consulting company is owned by Kurt and Sharlee Cretors. Optimized Business Transitions LLC specializes in assisting business owners with understanding their options for business transition and coordinating this transition process with the other members of their advisory team. The fees for these services are quoted and received separate from any fees as they relate to services rendered by Avior Wealth Management LLC, or any of its other subsidiaries. Ms. Cretors spends approximately 5% of her time per month on this activity.

Additional Compensation

Ms. Cretors has an additional business activity where compensation is received which is detailed above under Other Business Activities.

Supervision

Sharlee Cretors is a member of Avior Wealth Management, LLC. Veronica LeDuc, the Chief Compliance Officer, is responsible for developing, overseeing and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives, including Ms Cretors. They may both be contacted at (402) 218-4064.

Professional Designation Disclosure

¹ The Certified Financial Planner™ (designation is issued by the Certified Financial Planner Board of Standards, Inc. It is a voluntary certification recognized by the United States and other countries for its (1) high standard of professional education, (2) stringent code of conduct and standards of practice and (3) ethical requirements governing professional engagements with clients. A candidate for designation must first obtain a bachelor's degree from an accredited college or university with courses that included financial planning subject areas (e.g., insurance planning, risk management, employee benefits planning, investment planning, income tax planning, retirement planning and estate planning). Candidates must also have at least 3 years of full-time personal financial planning experience, measured as 2,000 hours per year. CFP® candidates must pass a comprehensive examination designed to test their ability to correctly diagnose financial planning issues and apply their knowledge to real world circumstances. Candidates must also agree to be bound by the Certified Financial Planner Board's Standards of Professional Conduct. Anyone earning designation as a CFP® must complete 30 hours of continuing education every two years and renew the agreement to be bound by the Standards of Professional Conduct.

BROCHURE SUPPLEMENT

January 2, 2026

This brochure supplement provides information about Stephen Holmes that supplements the Avior Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Veronica LeDuc if you did not receive the Avior Wealth Management, LLC brochure or if you have any questions about the contents of this supplement.

Additional information about Stephen Holmes (CRD # 2443807) is available on the SEC's website at

www.adviserinfo.sec.gov.

Stephen Holmes

Avior Wealth Management, LLC

3200 Douglas Blvd., Suite 305

Roseville, CA 95661

Phone: (916) 367-4540

Educational Background and Business Experience

Stephen Holmes was born in 1960. Mr. Holmes graduated from Brigham Young University in 1986, with a BA in Humanities.

Mr. Holmes has been a member and an Investment Advisor Representative of Avior Wealth Management, LLC since January 2026. Before joining Avior Wealth Management, the predecessor to Avior, he was employed as an investment advisor representative of EWG Elevate Inc., dba Eagle West Group dba Protection Point Advisors from October 2010 through December 2025.

Disciplinary Information

Stephen Holmes has no disciplinary history that is required to be disclosed by the U.S. Securities and Exchange Commission or state regulatory authorities.

Other Business Activities

Stephen Holmes is also independently licensed as an insurance agent and may sell insurance products to clients and receive commissions when doing so. This is a potential conflict of interest, since commissions earned could be in addition to advisory fees earned in his capacity as an investment advisor representative. Clients are never obligated or required to purchase insurance products from or through Stephen Holmes and may select any independent insurance agent and insurance company to purchase insurance products. Regardless of the insurance agent selected, the insurance agent or agency will receive normal commissions from the sale.

Stephen Holmes spends all his work week on advisory matters.

Additional Compensation

Stephen Holmes does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Supervision

Stephen Holmes is a member of Avior Wealth Management, LLC. Veronica LeDuc, the Chief Compliance Officer, is responsible for developing, overseeing, and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives, including Mr. Holmes. They may both be contacted at (402) 218-4064.

BROCHURE SUPPLEMENT

July 29, 2025

This brochure supplement provides information about Stephen R. Patterson that supplements the Avior Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Veronica LeDuc if you did not receive the Avior Wealth Management, LLC brochure or if you have any questions about the contents of this supplement.

Additional information about Stephen R. Patterson is available on the SEC's website at

www.adviserinfo.sec.gov.

Stephen R. Patterson

Avior Wealth Management, LLC

14301 First National Bank Parkway, Suite 410

Omaha, Nebraska 68154

Phone: (402) 218-4064

Educational Background and Business Experience

Stephen R. Patterson was born in 1973 and graduated from Creighton University with a BSBA degree in Economics and Finance and an MBA degree. He has been a member and an Investment Advisor Representative with Avior Wealth Management, LLC since December 2015. He was an investment adviser representative with Lutz Financial Services, LLC. from December 2007 to December 2015. Mr. Patterson was a Vice President with First National Capital Markets, Inc. from August 2005 to November 2007.

Disciplinary Information

Stephen R. Patterson has no disciplinary history that is required to be disclosed by the U.S. Securities and Exchange Commission or state regulatory authorities.

Other Business Activities

Stephen Patterson is also independently licensed as an insurance agent and may sell insurance products to clients and receive commissions when doing so. This is a potential conflict of interest, since commissions earned could be in addition to advisory fees earned in his capacity as an investment advisor representative. Clients are never obligated or required to purchase insurance products from or through Steve Patterson and may select any independent insurance agent and insurance company to purchase insurance products. Regardless of the insurance agent selected, the insurance agent or agency will receive normal commissions from the sale.

Mr. Patterson spends all his work week on advisory matters.

Additional Compensation

Steven R. Patterson does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Supervision

Steven Patterson is a member of Avior Wealth Management, LLC. Veronica LeDuc, the Chief Compliance Officer, is responsible for developing, overseeing, and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives, including Mr. Patterson. They may both be contacted at (402) 218-4064.

BROCHURE SUPPLEMENT

July 29, 2025

This brochure supplement provides information about Steve L Esch that supplements the Avior Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Veronica LeDuc if you did not receive the Avior Wealth Management, LLC brochure or if you have any questions about the contents of this supplement.

Additional information about Steve L Esch is available on the SEC's website at

www.adviserinfo.sec.gov.

Steve L. Esch

Avior Wealth Management, LLC
14301 First National Bank Parkway, Suite 410
Omaha, Nebraska 68154
Phone: (402) 218-4064

Educational Background and Business Experience

Steve L Esch was born in 1992 and graduated in 2014 from the Creighton University with a Bachelor of Science Degree in Business Administration. In 2016, Mr. Esch attained designation as a Certified Financial Planner™ (CFP®).¹ He is also a Chartered Financial Analyst (CFA®).²

Mr. Esch has been a member and an Investment Advisor Representative of Avior Wealth Management, LLC since March 2017. Before that, he was a Financial Planning Specialist with Avior Wealth Management, LLC from August 2014 to Present.

Disciplinary Information

Steve L Esch has no disciplinary history that is required to be disclosed by the U.S. Securities and Exchange Commission or state regulatory authorities.

Other Business Activities

Mr. Esch is a Member of the Board of Directors of CVC Holdings and is sole owner of SLE Property Holdings, LLC. Steve receives W2 compensation as a director of CVC.

Steve L Esch spends all his work week on advisory matters. Steve's responsibilities as a director of CVC are done after work hours.

Additional Compensation

Steve L. Esch does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Supervision

Steve Esch is a member of Avior Wealth Management, LLC. Veronica LeDuc, the Chief Compliance Officer, is responsible for developing, overseeing, and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives, including Mr. Esch. They may both be contacted at (402) 218-4064.

Professional Designation Disclosure

¹ The Certified Financial Planner™ (CFP®) designation is issued by the Certified Financial Planner Board of Standards, Inc. It is a voluntary certification recognized by the United States and other countries for its (1) high standard of professional education, (2) stringent code of conduct and standards of practice and (3) ethical requirements governing professional engagements with clients. A candidate for designation must first obtain a bachelor's degree from an accredited college or university with courses that included financial planning subject areas (e.g., insurance planning, risk management, employee benefits planning, investment planning, income tax planning, retirement planning and estate planning). Candidates must

also have at least 3 years of full-time personal financial planning experience, measured as 2,000 hours per year. CFP® candidates must pass a one-day comprehensive examination designed to test their ability to correctly diagnose financial planning issues and apply their knowledge to real world circumstances. Candidates must also agree to be bound by the Certified Financial Planner Board's Standards of Professional Conduct. Anyone earning designation as a CFP® must complete 30 hours of continuing education every two years and renew the agreement to be bound by the Standards of Professional Conduct.

2. Chartered Financial Analyst ("CFA® ") The Chartered Financial Analyst ("CFA® ") charter is a professional designation established in 1962 and awarded by CFA® Institute. To earn the CFA® charter, candidates must pass three sequential, six-hour examinations over two to four years. The three levels of the CFA® Program test a wide range of investment topics, including ethical and professional standards, fixed-income analysis, alternative and derivative investments, and portfolio management and wealth planning. In addition, CFA® charterholders must have at least four years of acceptable professional experience in the investment decision-making process and must commit to abide by, and annually reaffirm, their adherence to the CFA® Institute Code of Ethics and Standards of Professional Conduct. CFA® is a trademark owned by CFA® Institute.

BROCHURE SUPPLEMENT

March 26, 2025

This brochure supplement provides information about Steven R Ryherd that supplements the Avior Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Veronica LeDuc if you did not receive the Avior Wealth Management, LLC brochure or if you have any questions about the contents of this supplement.

Additional information about Steven R Ryherd is available on the SEC's website at

www.adviserinfo.sec.gov.

Steven R. Ryherd

Avior Wealth Management, LLC
14301 First National Bank Parkway, Suite 410
Omaha, Nebraska 68154
Phone: (402) 218-4064

Educational Background and Business Experience

Steven R. Ryherd established his career in personal finance in 2014 after developing a successful practice as an owner of a consulting business in the building industry. Steve's professional career built upon his master's degrees in engineering from the University of Nebraska and Chalmers Technical University in Sweden. After moving to Atlanta, Georgia, he was a partner in Arpeggio Acoustic Consulting starting in 2008 where he served clients' needs to address project-specific goals.

In 2014, Steve returned to Nebraska where he leveraged his skills in problem solving and client relations to pursue his passion for personal finance by joining Edward Jones. After extensive training and successful completion of securities license exams, Steve built and managed a successful branch office as a Financial Advisor in La Vista, Nebraska, from

November 2014 to October 2018.

In October 2018, he joined Verdant Wealth, a dba of Avior, as an Investment Advisor Representative to further serve clients through comprehensive financial planning.

Disciplinary Information

Steven R. Ryherd has no disciplinary history that is required to be disclosed by the U.S. Securities and Exchange Commission or state regulatory authorities.

Other Business Activities

Steven R. Ryherd is also independently licensed as an insurance agent and may sell insurance products to clients and receive commissions when doing so. This is a potential conflict of interest, since commissions earned could be in addition to advisory fees earned in his capacity as an investment advisor representative. Clients are never obligated or required to purchase insurance products from or through Steven R. Ryherd and may select any independent insurance agent and insurance company to purchase insurance products. Regardless of the insurance agent selected, the insurance agent or agency will receive normal commissions from the sale.

Mr. Ryherd spends all his work week on advisory matters.

Additional Compensation

Steven R. Ryherd does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Supervision

Steven Ryherd is a member of Avior Wealth Management, LLC. Veronica LeDuc, the Chief Compliance Officer, is responsible for developing, overseeing, and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives, including Mr. Ryherd. They may both be contacted at (402) 218-4064.

BROCHURE SUPPLEMENT

March 26, 2025

This brochure supplement provides information about Tiffany E. Riedel that supplements the Avior Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Veronica LeDuc if you did not receive the Avior Wealth Management, LLC brochure or if you have any questions about the contents of this supplement.

Additional information about Tiffany E. Riedel is available on the SEC's website at

www.adviserinfo.sec.gov.

Tiffany E. Riedel

Avior Wealth Management, LLC
14648 N. Scottsdale Rd, Suite 300
Scottsdale, AZ 85254
Phone: 480.391.9091

Educational Background and Business Experience

Tiffany E. Riedel earned a Bachelor of Arts in Psychology from Lafayette College in 1993.

Disciplinary Information

Ms. Riedel has no disciplinary history that is required to be disclosed by the U.S. Securities and Exchange Commission or state regulatory authorities.

Other Business Activities

Ms. Riedel spends all her work week on advisory matters.

Additional Compensation

Ms. Riedel does not receive any other economic benefit from a non-advisory client for the provision of advisory services.

Supervision

Tiffany Riedel is a member of Avior Wealth Management, LLC. Veronica LeDuc, the Chief Compliance Officer, is responsible for developing, overseeing and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives, including Ms. Venditti. They may both be contacted at (402) 218-4064.

BROCHURE SUPPLEMENT

July 29, 2025

This brochure supplement provides information about Timothy Mollak that supplements the Avior Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Veronica LeDuc if you did not receive the Avior Wealth Management, LLC brochure or if you have any questions about the contents of this supplement.

Additional information about Timothy Mollak is available on the SEC's website at

www.adviserinfo.sec.gov

Timothy Mollak

Avior Wealth Management, LLC

14301 First National Bank Parkway, Suite 410

Omaha, Nebraska 68154

Phone: (402) 218-4064

Educational Background and Business Experience

Timothy Mollak attended the University of Nebraska at Omaha and graduate in 2017.

Mr. Mollak worked at Cavey & Associates, LLC before joining Avior Wealth Management, LLC in May of 2020.

Disciplinary Information

Timothy Mollak has no disciplinary history that is required to be disclosed by the U.S. Securities and Exchange Commission or state regulatory authorities.

Other Business Activities

Mr. Mollak is also independently licensed as an insurance agent and may sell insurance products to clients and receive commissions when doing so. This is a potential conflict of interest, since commissions earned could be in addition to advisory fees earned in his capacity as an investment advisor representative. Clients are never obligated or required to purchase insurance products from or through Mr. Mollak and may select any independent insurance agent and insurance company to purchase insurance products. Regardless of the insurance agent selected, the insurance agent or agency will receive normal commissions from the sale.

Additional Compensation

Timothy Mollak does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Supervision

Timothy Mollak is a member of Avior Wealth Management, LLC. Veronica LeDuc, the Chief Compliance Officer, is responsible for developing, overseeing, and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives, including Mr. Mollak. They may both be contacted at (402) 218-4064.

BROCHURE SUPPLEMENT

July 29, 2025

This brochure supplement provides information about Anthony L. Cerone that supplements the Avior Wealth Management, LLC brochure.

You should have received a copy of that brochure. Please contact Veronica LeDuc if you did not receive the Avior Wealth Management, LLC brochure or if you have any questions about the contents of this supplement.

Additional information about Anthony L. Cerone is available on the SEC's website at www.adviserinfo.sec.gov.

Anthony L. Cerone CFP®

Avior Wealth Management, LLC

14301 First National Bank Parkway, Suite 410

Omaha, Nebraska 68154

Phone: (402) 218-4064

Educational Background and Business Experience

Anthony L. Cerone was born in 1972. Mr. Cerone graduated from Nebraska Wesleyan University, with a Bachelor of Science Degree in Economics and a MSBA degree in Tax and Financial Planning from San Diego State University. In 2001, Mr. Cerone has attained the designation as a Certified Financial Planner® (CFP®).¹

Mr. Cerone has been a member and an Investment Advisor Representative of Avior Wealth Management, LLC since February 2016. Before joining Avior Wealth Management, the predecessor to Avior, he was employed as an investment advisor representative of Lutz Financial from July 2005 to February 2016 and at Merrill Lynch as a Financial Planning Specialist from June 2000 to June 2003 and then as a Financial Advisor from 2003 to 2005.

Disciplinary Information

Anthony L. Cerone has no disciplinary history that is required to be disclosed by the U.S. Securities and Exchange Commission or state regulatory authorities.

Other Business Activities

Anthony Cerone is also independently licensed as an insurance agent and may sell insurance products to clients and receive commissions when doing so. This is a potential conflict of interest, since commissions earned could be in addition to advisory fees earned in his capacity as an investment advisor representative. Clients are never obligated or required to purchase insurance products from or through Anthony Cerone and may select any independent insurance agent and insurance company to purchase insurance products. Regardless of the insurance agent selected, the insurance agent or agency will receive normal commissions from the sale.

Anthony Cerone spends all his work week on advisory matters.

Additional Compensation

Anthony L. Cerone does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Supervision

Anthony Cerone is a member of Avior Wealth Management, LLC. Veronica LeDuc, the Chief Compliance Officer, is responsible for developing, overseeing, and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives, including Mr. Cerone. They may both be contacted at (402) 218-4064.

Professional Designation Disclosure

¹ The Certified Financial Planner™ (CFP®) designation is issued by the Certified Financial Planner Board of Standards, Inc. It is a voluntary certification recognized by the United States and other countries for its (1) high standard of professional education, (2) stringent code of conduct and standards of practice and (3) ethical requirements governing professional

engagements with clients. A candidate for designation must first obtain a bachelor's degree from an accredited college or university with courses that included financial planning subject areas (e.g., insurance planning, risk management, employee benefits planning, investment planning, income tax planning, retirement planning and estate planning). Candidates must also have at least 3 years of full-time personal financial planning experience, measured as 2,000 hours per year. CFP[®] candidates must pass a 2-day comprehensive examination designed to test their ability to correctly diagnose financial planning issues and apply their knowledge to real world circumstances. Candidates must also agree to be bound by the Certified Financial Planner Board's Standards of Professional Conduct. Anyone earning designation as a CFP[®] must complete 30 hours of continuing education every two years and renew the agreement to be bound by the Standards of Professional Conduct.

BROCHURE SUPPLEMENT

March 26, 2025

This brochure supplement provides information about Tristan Raymond Kelly that supplements the Avior Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Veronica LeDuc if you did not receive the Avior Wealth Management, LLC brochure or if you have any questions about the contents of this supplement.

Additional information about Tristan Raymond Kelly is available on the SEC's website at www.adviserinfo.sec.gov.

Tristan Raymond Kelly

Avior Wealth Management, LLC
11100 Wayzata Blvd, Suite 210,
Minnetonka, MN 55305
Phone: (763)-542-8884

Educational Background and Business Experience

Tristan Raymond Kelly graduated from Creighton University with a Bachelor of Science in Business Administration, Finance/Financial Planning in 2022.

In 2022, Kelly joined Avior as a Financial Planner. Prior to this, he worked intermittently with Thrivent Financial from 2021 to 2022 as a Financial Professional Intern and an Office Professional while studying in college.

Disciplinary Information

Tristan Kelly has no disciplinary history that is required to be disclosed by the U.S. Securities and Exchange Commission or state regulatory authorities.

Other Business Activities

Mr. Kelly spends all his work week on advisory matters.

Additional Compensation

Mr. Kelly does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Supervision

Tristan Raymond Kelly is a member of Avior Wealth Management, LLC. Veronica LeDuc, the Chief Compliance Officer, is responsible for developing, overseeing, and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives, including Mr. Kelly. They may both be contacted at (402) 218-4064.

BROCHURE SUPPLEMENT

July 29, 2025

This brochure supplement provides information about Will Shafroth that supplements the Avior Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Veronica LeDuc if you did not receive the Avior Wealth Management, LLC brochure or if you have any questions about the contents of this supplement.

Additional information about Will Shafroth is available on the SEC's website at

www.adviserinfo.sec.gov.

Will Shafroth

Avior Wealth Management, LLC

14301 First National Bank Parkway, Suite 410

Omaha, Nebraska 68154

Phone: (402) 218-4064

Educational Background and Business Experience

Mr. Shafroth attended the University of Denver and graduated in 2011 with a Bachelor of Arts in International Studies, with a Minor in Economics. Mr. Shafroth attained the designation as a Certified Financial Planner™ (CFP®).

Mr. Shafroth worked at Fidelity Investments before joining Avior Wealth Management, LLC in May of 2018. Previously, he also worked at Merrill Lynch.

Disciplinary Information

Will Shafroth has no disciplinary history that is required to be disclosed by the U.S. Securities and Exchange Commission or state regulatory authorities.

Other Business Activities

Mr. Shafroth spends all his work week on advisory matters.

Additional Compensation

Will Shafroth does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Supervision

Will Shafroth is a member of Avior Wealth Management, LLC. Veronica LeDuc, the Chief Compliance Officer, is responsible for developing, overseeing, and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives, including Mr. Shafroth. They may both be contacted at (402) 218-4064.

Professional Designation Disclosure

¹ The Certified Financial Planner™ (CFP®) designation is issued by the Certified Financial Planner Board of Standards, Inc. It is a voluntary certification recognized by the United States and other countries for its (1) high standard of professional education, (2) stringent code of conduct and standards of practice and (3) ethical requirements governing professional engagements with clients. A candidate for designation must first obtain a bachelor's degree from an accredited college or university with courses that included financial planning subject areas (e.g., insurance planning, risk management, employee benefits planning, investment planning, income tax planning, retirement planning and estate planning). Candidates must also have at least 3 years of full-time personal financial planning experience, measured as 2,000 hours per year. CFP® candidates must pass a comprehensive examination designed to test their ability to correctly diagnose financial planning issues and apply their knowledge to real world circumstances. Candidates must also agree to be bound by the Certified Financial Planner Board's Standards of Professional Conduct. Anyone earning designation as a CFP® must complete 30 hours of continuing education every two years and renew the agreement to be bound by the Standards of Professional Conduct.

BROCHURE SUPPLEMENT

July 29, 2025

This brochure supplement provides information about Aaron Tomita that supplements the Avior Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Veronica LeDuc if you did not receive the Avior Wealth Management, LLC brochure or if you have any questions about the contents of this supplement.

Additional information about Aaron Tomita is available on the SEC's website at

www.adviserinfo.sec.gov.

Aaron Tomita, CFP® , CIMA®, CEPA®

Avior Wealth Management, LLC

14301 FNB Pkwy, Suite 410

Omaha, Nebraska 68154

(402) 218-4064

Educational Background and Business Experience

Aaron E. Tomita attended Creighton University's Heider College of Business and graduated in 2020 with a Bachelor of Science Degree in Business Administration with a focus in Financial Planning. In 2021, Mr. Tomita attained the designation of Certified Exit Planning Advisor (CEPA®). In 2022, Mr. Tomita attained the designation of CERTIFIED FINANCIAL PLANNER™ (CFP®). In 2024, Mr. Tomita attained the designation of Certified Investment Management Analyst® (CIMA®).

Before joining Avior Wealth Management, LLC., Aaron Tomita worked for Nelson, Van Denburg & Campbell Wealth Management from 2020 through 2021, and interned with Fortune Financial Corp. DBA Fidelity Financial, and Nelson, Van Denburg & Campbell Wealth Management, and Renaissance Financial.

Disciplinary Information

Mr. Tomita has no disciplinary history that is required to be disclosed by the U.S. Securities and Exchange Commission or state regulatory authorities.

Other Business Activities

Mr. Tomita spends all his work week on advisory matters.

Mr. Tomita is also independently licensed as an insurance agent for life and annuities and may sell insurance products to clients and receive commissions when doing so. This is a potential conflict of interest, since commissions earned could be in addition to advisory fees earned in his capacity as an investment advisor representative. Clients are never obligated or required to purchase insurance products from or through Mr. Tomita and may select any independent insurance agent and insurance company to purchase insurance products. Regardless of the insurance agent selected, the insurance agent or agency will receive normal commissions from the sale.

Additional Compensation

Mr. Tomita does not receive any other economic benefit from a non-advisory client for the provision of advisory services.

Supervision

Aaron Tomita is a member of Avior Wealth Management, LLC. Veronica LeDuc, the Chief Compliance Officer, is responsible for developing, overseeing and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives, including Mr. Tomita. They may both be contacted at (402) 218-4064.

Professional Designation Disclosure

¹The Certified Financial Planner™ (CFP®) designation is issued by the Certified Financial Planner Board of Standards, Inc. It is a voluntary certification recognized by the United States and other countries for its (1) high standard of professional education, (2) stringent code of conduct and standards of practice and (3) ethical requirements governing professional engagements with clients. A candidate for designation must first obtain a bachelor's degree from an accredited college or university with courses that included financial planning subject

areas (e.g., insurance planning, risk management, employee benefits planning, investment planning, income tax planning, retirement planning and estate planning). Candidates must also have at least 3 years of full-time personal financial planning experience, measured as 2,000 hours per year. CFP® candidates must pass a comprehensive examination designed to test their ability to correctly diagnose financial planning issues and apply their knowledge to real world circumstances. Candidates must also agree to be bound by the Certified Financial Planner Board's Standards of Professional Conduct. Anyone earning designation as a CFP® must complete 30 hours of continuing education every two years and renew the agreement to be bound by the Standards of Professional Conduct.

2 The Certified Exit Planning Advisor credential is conferred by the Exit Planning Institute, Inc. To obtain the CEPA credential, an individual must complete the CEPA Program, a four-day in-person or five-day online program designed to show advisors how to help business owners align their business, personal and financial needs in the exit planning process, pass a closed book proctored examination, and pay an examination fee. In order to maintain the CEPA credential, individuals must complete a minimum of 40 hours of continuing education every two years, of which at least 20 hours must come from the Exit Planning Institute, they must also pay an annual fee.

3 The Certified Investment Management Analyst® (CIMA®) designation is administered through the Investments & Wealth Institute®. The CIMA® certification signifies that an individual has met initial and on-going experience and ethical, education and examination requirements for investment management consulting, including advanced investment management theory and application. Prerequisites for the CIMA® certification are three years of financial services experience and an acceptable regulator history. To obtain the certification, candidates must (1) exhibit three years of relevant work experience in financial services before certification (2) disclose any potential or real violations of the Investments & Wealth Institute Code of Professional Responsibility. Additionally, they must successfully pass two comprehensive background checks (3) must complete an executive education course at one of several CIMA-registered education provider programs (4) pass a stringent examination administered at a third-party testing center prior to certification. CIMA® designees are required to adhere to IWI's Code of Professional Responsibility, Standards of Practice, and Rules and Guidelines for Use of the Marks. In order to maintain the CIMA® designation, designees must (1) report 40 hours of continuing education credits, including two ethics hours and one hour of tax or regulation information every two years (2) adhere to Investments & Wealth Institute Code of Professional Responsibility and report any complaints or disciplinary actions registered during the previous two-year period (3) pay a renewal fee.

BROCHURE SUPPLEMENT

March 26, 2025

This brochure supplement provides information about Adam Cervantes that supplements the Avior Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Veronica LeDuc if you did not receive the Avior Wealth Management, LLC brochure or if you have any questions about the contents of this supplement.

Additional information about Adam Cervantes is available on the SEC's website at

www.adviserinfo.sec.gov.

Adam Cervantes

Avior Wealth Management, LLC
10655 Six Pines Drive, Suite 100
The Woodlands, TX 77380
(281) 367-2483

Educational Background and Business Experience

Adam Cervantes earned his Bachelor of Science in Personal Financial Planning from Texas Tech University in 2018. Prior to joining Avior, Mr. Cervantes worked for the Financial Advisory Group as a Financial Planner.

Disciplinary Information

Mr. Cervantes has no disciplinary history that is required to be disclosed by the U.S. Securities and Exchange Commission or state regulatory authorities.

Other Business Activities

Mr. Cervantes spends all his work week on advisory matters.

Additional Compensation

Mr. Cervantes does not receive any other economic benefit from a non-advisory client for the provision of advisory services.

Supervision

Adam Cervantes is a member of Avior Wealth Management, LLC. Veronica LeDuc, the Chief Compliance Officer, is responsible for developing, overseeing and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives, including Mr. Cervantes. They may both be contacted at (402) 218-4064.