Wealth Enhancement®

Summary of Material Changes

The following is a summary of material changes made to the brochure since its last amendment dated November 2025.

- Item 4 of the brochure, "**Advisory Business**" was updated to reflect the addition of our affiliate, Advisory Solutions Group, LLC ("ASG"), which provides operational services including billing, trading support, money movement, model management, and Turnkey Asset Management Program ("TAMP") services.

- Item 10 of the brochure, **"Relationship with Affiliated and Unaffiliated Investment Advisers"** was updated to reflect Advisory Solutions Group, LLC ("ASG") as an affiliated registered investment adviser.

Please refer to the item numbers listed above for complete details about these changes in the brochure.