

BROCHURE SUPPLEMENT

Form ADV Part 2B

July 6, 2026

Uwaila “Will” Osagiede, CFP®, AWMA®

President, Chief Compliance Officer, and Investment Adviser Representative

CRD Number: 5335910

PeakStone Wealth Management, LLC

This brochure supplement provides information about Will Osagiede that supplements PeakStone Wealth Management, LLC’s Form ADV Part 2A brochure. You should have received a copy of that brochure. Please contact PeakStone Wealth Management, LLC if you did not receive the brochure or if you have questions about the contents of this supplement.

Additional information about Will Osagiede is available on the SEC’s website at www.adviserinfo.sec.gov.

You may contact us at hello@peakstonewealth.com, by phone at (303) 539-9077, online at peakstonewealth.com, or by mail at 8700 E Jefferson Ave #370272, Denver, CO 80237.

Item 2: Educational Background and Business Experience

Year of Birth: 1983

Education

- Colorado Technical University, Bachelor of Science in Financial Planning, with honors, 2013
- The American College of Financial Services, Life Underwriter Training Council Fellow coursework/designation, 2012

Professional Designations

Will Osagiede holds the following professional designations:

- CERTIFIED FINANCIAL PLANNER™ professional, CFP Board, 2014
- Accredited Wealth Management AdvisorSM, College for Financial Planning, 2013

Business Background for the Preceding Five Years

- 2014 to Present: President, Chief Compliance Officer, and Investment Adviser Representative, PeakStone Wealth Management, LLC, Denver, Colorado

Explanation of Professional Designations

PeakStone provides the following information to help clients understand the professional designations held by Will Osagiede.

CERTIFIED FINANCIAL PLANNER™ Professional

The CERTIFIED FINANCIAL PLANNER™, CFP®, and related certification marks are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”).

The CFP® certification is voluntary. No federal or state law requires a financial planner to hold the CFP® certification. CFP® professionals must satisfy education, examination, experience, and ethics requirements established by CFP Board.

To obtain the CFP® certification, an individual generally must:

- Complete financial planning coursework approved by CFP Board and hold a bachelor’s degree or higher from an accredited college or university.
- Pass the CFP® certification examination.
- Complete the required financial planning experience.
- Agree to comply with CFP Board’s Code of Ethics and Standards of Conduct.

To maintain the CFP® certification, CFP® professionals must complete continuing education and ethics requirements and remain subject to CFP Board’s enforcement process. CFP® professionals who fail to comply with CFP Board’s standards may be subject to discipline, including suspension or revocation of the right to use the CFP® marks.

Accredited Wealth Management AdvisorSM

The Accredited Wealth Management AdvisorSM, or AWMA®, designation is issued by the College for Financial Planning.

The AWMA® designation is voluntary. To obtain the designation, an individual generally must complete a course of study covering wealth management strategies and pass an end-of-course examination.

To maintain the AWMA® designation, individuals must complete continuing education requirements and comply with applicable standards of professional conduct and self-disclosure requirements.

Item 3: Disciplinary Information

Registered investment advisers are required to disclose material facts regarding legal or disciplinary events that would be material to a client's evaluation of a supervised person providing investment advice.

Will Osagiede has not been subject to any legal or disciplinary event that is material to a client's evaluation of his advisory services.

Item 4: Other Business Activities

Will Osagiede is licensed in his personal capacity to sell life, accident, and health insurance products. PeakStone Wealth Management, LLC is not an insurance agency and does not sell insurance products through its advisory business.

If Will assists a client with insurance implementation outside of PeakStone's advisory business, he may receive insurance-related compensation in his personal capacity. This creates a conflict of interest because he may have an incentive to recommend insurance implementation that results in additional compensation.

Clients are not required to purchase insurance products through Will or any particular insurance professional. Before any insurance implementation, Will will disclose the role he is acting in, the compensation he may receive, and the related conflict of interest.

Will may also be involved with other business, educational, technology, or content-related activities outside of PeakStone, including OnWealth and Edovest. These activities are separate from PeakStone's advisory business. They may create a conflict of interest because they may involve Will's time, attention, or economic interests outside of PeakStone.

Item 5: Additional Compensation

Registered investment advisers are required to disclose material facts regarding additional compensation received by supervised persons if a non-client provides an economic benefit to the supervised person for providing advisory services.

Will Osagiede does not receive sales awards, prizes, bonuses, referral fees, or other economic benefits from non-clients for providing advisory services to PeakStone clients.

Item 6: Supervision

Will Osagiede is President and Chief Compliance Officer of PeakStone Wealth Management, LLC. As Chief Compliance Officer, he is responsible for supervising PeakStone's advisory activities and for administering the firm's compliance policies and procedures.

Because Will is the firm's sole investment adviser representative, he supervises his own advisory activities through PeakStone's written compliance policies, books and records, client file review, disclosure review, and ongoing regulatory obligations.

Clients may contact PeakStone Wealth Management, LLC with questions about Will's advisory activities or supervision.

Item 7: Requirements for State-Registered Advisers

State-registered investment advisers are required to disclose certain additional information about supervised persons.

Will Osagiede has not been involved in an award or found liable in an arbitration claim alleging damages in excess of the disclosure threshold required by Form ADV Part 2B.

Will Osagiede has not been found liable in a civil, self-regulatory organization, or administrative proceeding involving an investment-related business or activity, fraud, false statements or omissions, theft, embezzlement, wrongful taking of property, bribery, forgery, counterfeiting, extortion, or dishonest, unfair, or unethical practices.

Will Osagiede has not been the subject of a bankruptcy petition.