

This brochure supplement provides information about Robert Rae Barton that supplements the Lifestyle Asset Management, Inc. brochure. You should have received a copy of that brochure. Please contact Robert Rae Barton if you did not receive Lifestyle Asset Management, Inc.'s brochure or if you have any questions about the contents of this supplement.

Additional information about Robert Rae Barton is also available on the SEC's website at www.adviserinfo.sec.gov.

Lifestyle Asset Management, Inc.

Form ADV Part 2B – Individual Disclosure Brochure

for

Robert Rae Barton

Personal CRD Number: 157450

Investment Adviser Representative

Lifestyle Asset Management, Inc.
211 W. Edgewood, Suite 100
Friendswood, TX 77546
(281) 992-9220

UPDATED: 09/01/2026

Item 2: Educational Background and Business Experience

Name: Robert Rae Barton

Born: 1964

Educational Background and Professional Designations:

Education:

B.S. Marshall University, 1986

Business Background:

08/2026 - Present	Chief Operations Officer Lifestyle Asset Management, Inc.
2026 - Present	Chief Executive Officer and Chief Operating Officer Momentum Execution Group
05/2023 - 08/2026	Chief Operating Officer Hobart Wealth
10/2018 - 04/2023	Investment Adviser Representative Prudential Financial Planning Services
09/2018 - 04/2023	Registered Representative Pruco Securities, LLC

Item 3: Disciplinary Information

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

Item 4: Other Business Activities

Robert Rae Barton serves as the Chief Executive Officer and Chief Operating Officer of Momentum Execution Group, a Charlotte, North Carolina-based business consulting firm. Through Momentum Execution Group, Robert Rae Barton provides executive advisory and operational consulting services focused on strategic execution, organizational performance,

leadership, accountability, revenue growth, and business operations. These activities are separate from his investment advisory activities and do not involve providing investment advice or securities-related services. Robert Rae Barton may receive compensation for these services. Lifestyle Asset Management, Inc. monitors this outside business activity for potential conflicts of interest and does not expect it to materially interfere with Robert Rae Barton's responsibilities to the Firm or its clients.

Item 5: Additional Compensation

Robert Rae Barton does not receive any economic benefit from any person, company, or organization, other than specified in Other Business Activities (Item 4) above in exchange for providing clients advisory services through Lifestyle Asset Management, Inc.

Item 6: Supervision

As a representative of Lifestyle Asset Management, Inc., Robert Rae Barton is supervised by Ross A Wegner, the firm's Chief Compliance Officer. Ross A Wegner is responsible for ensuring that Robert Rae Barton adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Ross A Wegner is (281) 992-9220.