

This brochure supplement provides information about Chanse James Wegner that supplements the Lifestyle Asset Management, Inc. brochure. You should have received a copy of that brochure. Please contact Chanse James Wegner 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 Chanse James Wegner 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

Chanse James Wegner

Personal CRD Number: 7863608

Investment Adviser Representative

Lifestyle Asset Management, Inc.
211 West Edgewood Suite 300
Friendswood, TX 77546
(281) 992-9220
cwegner@mylsfa.com

UPDATED: 06/09/2026

Item 2: Educational Background and Business Experience

Name: Chanse James Wegner **Born:** 1998

Educational Background and Professional Designations:

Education:

Bachelor of Science in Industrial Distribution, Texas A&M University - 2021

Business Background:

6 / 2026 - Present	Investment Adviser Representative Lifestyle Asset Management
12 / 2025 - Present	Registered Representative Cetera Advisors LLC
1/ 2024 - 11/2025	Client Services Representative Lifestyle Asset Management, Inc.
12/ 2021 - 12/ 2023	Operations Loan Analyst FlipCo Financial, 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

In addition to his activities as an Investment Adviser Representative of Lifestyle Asset Management, Inc., Chanse James Wegner is a Registered Representative of Cetera Advisors LLC, a registered broker-dealer and member FINRA/SIPC. As a Registered Representative, Chanse James Wegner may offer securities products and receive commissions or other transaction-based compensation in connection with the sale of securities. This compensation is separate from the advisory fees charged by Lifestyle Asset Management, Inc. for investment advisory services.

The receipt of commissions creates a conflict of interest because Chanse James Wegner has a financial incentive to recommend securities products that generate commissions. Clients are under no obligation to purchase securities products through Cetera Advisors LLC or through Chanse James Wegner in his capacity as a Registered Representative. Lifestyle Asset Management, Inc. has adopted policies and procedures designed to address these conflicts of interest, including disclosure requirements and supervisory oversight.

Item 5: Additional Compensation

Chanse James Wegner does not receive any economic benefit from any person, company, or organization, other than Lifestyle Asset Management, Inc. in exchange for providing clients advisory services through Lifestyle Asset Management, Inc.

Item 6: Supervision

As a representative of Lifestyle Asset Management, Inc., Chanse James Wegner is supervised by Ross Allen Wegner, the firm's Chief Compliance Officer. Ross Allen Wegner is responsible for ensuring that Chanse James Wegner 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 Allen Wegner is (281) 992-9220.