

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

Additional information about Ross Allen Wegner is also available on the SEC's website at www.adviserinfo.sec.gov.

Lifestyle Asset Management

Form ADV Part 2B – Individual Disclosure Brochure

for

Ross Allen Wegner

Personal CRD Number: 7004489

Investment Adviser Representative

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

UPDATED: 01/28/2026

Item 2: Educational Background and Business Experience

Name: Ross Allen Wegner **Born:** 1996

Educational Background and Professional Designations:

Education:

Bachelor of Science Agribusiness, Texas A&M University - 2018

Business Background:

04/2024 - Present	Chief Compliance Officer Lifestyle Asset Management
04/2023 - Present	Registered Representative Cetera Advisors LLC
01/2023 - Present	Investment Adviser Representative Lifestyle Asset Management
09/2022 - 04/2023	Registered Sales Assistant Cetera Advisors LLC
05/2021 - 01/2023	Sales Assistant Lifestyle Financial Advisors
05/2021 - 09/2022	Registered Sales Assistant First Allied Securities, Inc.
04/2018 - 05/2021	Internal Wholesaler AIG
08/2014 - 05/2018	Student Texas A&M

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

Ross Allen Wegner is a registered representative with Cetera Advisors. From time to time, he will offer clients advice or products from those activities. Clients should be aware that these services pay a commission and involve a conflict of interest, as commissionable products conflict with the fiduciary duties of a registered investment adviser. Lifestyle Asset Management always acts in the best interest of the client, including the sale of commissionable products to advisory clients. Clients always have the right to decide whether or not to utilize the services of any representative of Lifestyle Asset Management in such individual's outside capacities.

Ross Allen Wegner is a licensed insurance agent. From time to time, he will offer clients advice or products from those activities. Clients should be aware that these services pay a commission and involve a conflict of interest, as commissionable products conflict with the fiduciary duties of a registered investment adviser. Lifestyle Asset Management always acts in the best interest of the client, including the sale of commissionable products to advisory clients. Clients always have the right to decide whether or not to utilize the services of any representative of Lifestyle Asset Management in such individual's outside capacities.

Item 5: Additional Compensation

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

Item 6: Supervision

As the Chief Compliance Officer of Lifestyle Asset Management, Ross Allen Wegner supervises all duties and activities of the firm. Ross Allen Wegner's contact information is on the cover page of this disclosure document. Ross Allen Wegner adheres to applicable regulatory requirements, together with all policies and procedures outlined in the firm's code of ethics and compliance manual.