

**Item 1: Cover Page
Part 2B of Form ADV: Brochure Supplement
January 29, 2026**

Jared Wayne Reynolds

NewEdge Advisors, LLC

DBA

Freedom Wealth Planning LLC

Located at:

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Supervised from:

**858 Camp Street
New Orleans, LA 70130
(877) 832-6632**

Firm Contact:

**William C. Brand
Chief Compliance Officer**

This brochure supplement provides information about Mr. Reynolds that supplements our brochure. You should have received a copy of that brochure. Please contact Mr. Brand if you did not receive New Edge Advisors LLC's brochure or if you have any questions about the contents of this supplement. Additional information about Mr. Reynolds is available on the SEC's website at www.adviserinfo.sec.gov by searching CRD #4452433.

Item 2: Educational Background & Business Experience

Jared W. Reynolds

Year of Birth: 1979

Educational Background:

- 1997 – 2002 University of Missouri; Bachelor of Science in Financial Planning

Business Background:

- 01/2025 – Present NewEdge Advisors, LLC; Financial Advisor
- 05/2020 – 01/2025 WR Wealth Planners, LLC; Financial Advisor / Co-Founder / Partner
- 01/2017 – 06/2020 V Wealth Advisors, LLC; Financial Advisor
- 01/2017 – 03/2020 LPL Financial Services, LLC; Registered Representative
- 09/2001 – 01/2017 Waddell & Reed; Financial Advisor

Exams, Licenses & Other Professional Designations:

- 2002 Series 66
- 2002 Missouri Insurance: Life, Accident, & Health
- 2025 Certified Exit Planning Advisor (CEPA®)
- 2019 Certified Private Wealth Advisor (CPWA®)
- 2016 Certified Plan Fiduciary Advisor (CPFA®)
- 2005 Certified Financial Planner (CFP®)

The Certified Exit Planning Advisor (CEPA®) credential is for professional advisors who want to effectively engage business owners in exit planning. The program includes a comprehensive five-day educational course that covers the Value Acceleration Methodology™. To earn the CEPA designation, candidates must pass a proctored, closed-book exam. Once certified, advisors are required to complete 40 hours of continuing education every three years to maintain their credential. Additionally, CEPA holders must adhere to a strict code of ethics and professional conduct standards.

The Certified Plan Fiduciary Advisor (CPFA®) credential program provides thorough training and emphasizes key learning areas such as fiduciary responsibility, regulatory compliance, and best practices in plan management. To obtain the CPFA credential, a candidate must successfully pass a proctored exam and apply for National Association of Plan Administrators (NAPA) membership. To maintain the CPFA credential, the professional must abide by the ARA Code of Professional Conduct and complete 10 hours of continuing education each year.

The Certified Financial Planner (CFP®) certification is obtained by completing an advanced college-level course of study addressing the financial planning subject areas that the CFP® Board's studies have determined as necessary for the competent and professional delivery of financial planning services, a comprehensive certification exam (administered in 6 hours over a 1-2-day period) and agreeing to be bound by the CFP® board's standard of professional conduct. As a prerequisite, the individual must have a Bachelor's degree from a regionally accredited United States college or university (or foreign university equivalent) and have at least three years of full-time financial planning experience (or equivalent measured at 2,000 hours per year). This designation requires 30

hours of continuing education every two years and renewing an agreement to be bound by the Standards of Professional Conduct.

The Certified Private Wealth Advisor (CPWA®) designation signifies that an individual has met initial and on-going experience, ethical, education, and examination requirements for the professional designation, which is centered on private wealth management topics and strategies for high-net-worth clients. Prerequisites for the CPWA® designation are: a Bachelor's degree from an accredited college or university or one of the following designations or licenses: CIMA®, CIMC®, CFA®, CFP®, ChFC®, or CPA license; have an acceptable regulatory history as evidenced by FINRA Form U-4 or other regulatory requirements and five years of experience in financial services or delivering services to high-net-worth clients. CPWA® designees have completed a rigorous educational process that includes executive education requirements and successful completion of a comprehensive examination. CPWA® designees are required to adhere to the Investments & Wealth Institute Code of Professional Responsibility and Rules and Guidelines for Use of the Marks. CPWA® designees must report 40 hours of continuing education credits, including two ethics hours, every two years to maintain the certification.

Item 3: Disciplinary Information¹

Mr. Reynolds has no disciplinary disclosures.

Item 4: Other Business Activities

Mr. Reynolds conducts advisory services through NewEdge Advisors, LLC, a registered investment advisor, doing business as (DBA) Freedom Wealth Planning LLC. Mr. Reynolds is an investment advisor representative and devotes 160 hours per month to this activity during trading hours.

Mr. Reynolds is a licensed insurance agent/broker. He may offer insurance products and receive customary fees as a result of insurance sales. A conflict of interest may arise as these insurance sales may create an incentive to recommend products based on the compensation earned. To mitigate this potential conflict, Mr. Reynolds, as a fiduciary, will act in the client's best interest.

Mr. Reynolds is an owner/ member of Freedom Wealth Private Client Services LLC, which offers tax consulting. He devotes 10 hours per month to this activity outside of trading hours and 1 hour during trading hours.

¹ Note: Our firm may, under certain circumstances, rebut the presumption that a disciplinary event is material. If an event is immaterial, we are not required to disclose it. When we review a legal or disciplinary event involving the advisor to determine whether it is appropriate to rebut the presumption of materiality, we consider all of the following factors: (1) the proximity of advisor to the advisory function; (2) the nature of the infraction that led to the disciplinary event; (3) the severity of the disciplinary sanction; and (4) the time elapsed since the date of the disciplinary event. If we conclude that the materiality presumption has been overcome, we prepare and maintain a file memorandum of our determination in our records. We follow SEC rule 204-2(a)(14)(iii) and similar state rules.

Mr. Reynolds is also a member/investor with minimal involvement in the following non-investment related companies:

- Grindstone Village Properties – Real estate rental
- Reynolds Holding Group LLC – Business entity for tax purposes
- J&N Properties LLC – Real estate rental
- R2M2 LLC – Holding company for personal investments
- Mountain Adventures, LLC – Consulting company
- G3 Farms LLC – Crops & cattle
- Rockbridge Amigos LLC – Farm/Retreat owner
- Molon Labe Express LLC – Recreation and travel logistics company
- H&R Hilltop Ranch LLC – Recreational farm

Item 5: Additional Compensation

Mr. Reynolds received a one-time forgivable loan from New Edge Capital Group, LLC, the parent company of NewEdge Advisors. A portion of the loan is forgiven after each 12-month period for seven years. For further information, please refer to the firm's ADV.

Item 6: Supervision

Mr. Brand supervises and monitors Mr. Reynolds's activities on a regular basis to ensure compliance with our firm's Code of Ethics. Please contact Mr. Brand if you have any questions about Mr. Reynolds's brochure supplement at 877-832-6632.