FORM ADV PART 2B

Brochure Supplement

Jason Herring

Investment Adviser Representative — EHG Wealth Management LLC



INDIVIDUAL	Jason Herring • Individual CRD #8093410
FIRM	EHG Wealth Management LLC • Firm CRD #342819
FIRM ADDRESS	10475 Crosspoint Blvd, Suite 250, Indianapolis, IN 46256
FIRM TELEPHONE	(317) 623-2007
BROCHURE SUPPLEMENT DATE	October 8, 2026

This brochure supplement provides information about Jason Herring that supplements the EHG Wealth Management LLC ("EHG" or the "Firm") Form ADV Part 2A brochure. You should have received a copy of that brochure. Please contact Anthony G. DeCicco, Co-Founder & President, at (317) 623-2007 ext. 102 or anthonyd@echelonheritage.group if you did not receive EHG Wealth Management LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Jason Herring is available on the SEC's Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov, and on FINRA BrokerCheck at brokercheck.finra.org (search Individual CRD #8093410).

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ITEM 2 — EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Formal Education

Formal education information for Mr. Herring was not available in the IAPD registration report used to prepare this supplement. EHG Wealth Management LLC's Chief Compliance Officer will obtain and incorporate this information prior to finalizing this document.

Business Experience

The following reflects Mr. Herring's business background for at least the preceding five years, most recent position first, as reported in his IAPD registration report:

Dates	Firm	Location	Position
10/2026 – Present	EHG Wealth Management LLC	Indianapolis, IN	Investment Adviser Representative
10/2026 – Present	EHG Insurance Brokerage LLC	Indianapolis, IN	Insurance Producer
07/2026 – 09/2026	Freelance Writing (self-employed)	Hinesville, GA	Freelance Business Writer
06/2025 – 06/2026	Edward Jones	St. Louis, MO	Financial Adviser
11/2024 – 05/2025	Self-Employed / DoorDash, Inc. / Uber Technologies Inc.	San Francisco, CA	Delivery and Rideshare Driver
10/2024 – 11/2024	Patriot Grassroots	Alexandria, VA	Door-to-Door Canvasser
07/2024 – 10/2024	Your Home Improvement Company	Minneapolis, MN	Salesperson
04/2024 – 07/2024	GOL Security	Rincon, GA	Salesperson
12/2020 – 04/2024	Crane Alarm Services DBA American Fire Protection	Nampa, ID	Inspector

Note: Mr. Herring was registered as an investment adviser representative of Edward Jones (CRD #250), Richmond Hill, GA branch, from 08/2025 to 06/2026. Prior to 12/2020, his reported employment included roles with the Billy Graham Evangelistic Association, Stanton Healthcare, and North Valley Baptist Church (aka True North Church). Positions other than those with EHG Wealth Management LLC, EHG Insurance Brokerage LLC, and Edward Jones were not investment-related.

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ITEM 3 — PROFESSIONAL DESIGNATIONS AND MINIMUM QUALIFICATIONS

Jason Herring does not currently hold any professional certification, designation, or license (such as CERTIFIED FINANCIAL PLANNER™ (CFP®), Chartered Financial Consultant (ChFC®), Chartered Financial Analyst® (CFA®), Personal Financial Specialist (PFS), or Chartered Investment Counselor (CIC)) that requires disclosure of minimum qualifications under this Item.

Should Mr. Herring obtain a professional designation in the future, EHG Wealth Management LLC will amend this brochure supplement to describe the designation and its minimum qualification, experience, and continuing education requirements.

Securities Industry Registrations and Examinations on File

Separately from professional designations, Mr. Herring passed the Uniform Combined State Law Examination (Series 66) on August 20, 2025. Securities registrations and examinations are regulatory qualifications rather than professional designations and are not reportable under this Item.

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ITEM 4 — DISCIPLINARY INFORMATION

EHG Wealth Management LLC is required to disclose material facts about any legal or disciplinary event that would be material to a client's evaluation of Jason Herring or his integrity as an investment adviser representative. Mr. Herring's registration record reflects the following events, which are disclosed here in full.

Criminal Disclosure

On November 23, 2023, Mr. Herring was charged in the District Court of the Fourth Judicial District of the State of Idaho, County of Ada (Case No. CR01-23-35668), with one felony count of attempted strangulation. On February 6, 2024, the charge was amended to one misdemeanor count of disturbing the peace, to which Mr. Herring pled guilty. On February 26, 2024, the court entered a withheld judgment and imposed credit for one day served, one year of unsupervised probation, court costs, and counseling. The matter is final.

Financial Disclosure

On May 24, 2025, Mr. Herring reached a compromise with a creditor, CarMax, regarding an original amount owed of $8,547.75, which was settled for $6,837.75. His registration record reports this action as pending.

Mr. Herring's registration record reflects no regulatory actions, civil judicial proceedings, or customer disputes or arbitrations. Clients and prospective clients may review these disclosures free of charge on FINRA BrokerCheck at brokercheck.finra.org or the SEC's Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov, searching Individual CRD #8093410.

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ITEM 5 — OTHER BUSINESS ACTIVITIES

Insurance Activity

Since October 2026, Jason Herring has served as an Insurance Producer with EHG Insurance Brokerage LLC, a licensed insurance brokerage affiliated with the Firm and located at 10475 Crosspoint Blvd, Suite 250, Indianapolis, IN 46256. In this role, he educates clients on life, health, and annuity insurance products. He devotes approximately 10 hours per month to this activity.

Conflict of Interest

Because Mr. Herring may recommend insurance products placed through EHG Insurance Brokerage LLC to advisory clients, he has a financial incentive to recommend those products, which creates a conflict of interest between his interests and those of advisory clients. Clients are under no obligation to implement any insurance recommendation through Mr. Herring or EHG Insurance Brokerage LLC, and may purchase insurance products through any agent, broker, or carrier of their choosing.

EHG Wealth Management LLC addresses this conflict through the supervisory procedures described in Item 7 of this supplement and through disclosure in the Firm's Form ADV Part 2A brochure. Mr. Herring is not engaged in any other business or occupation.

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ITEM 6 — ADDITIONAL COMPENSATION

In connection with the insurance activity described in Item 5, Mr. Herring may receive commission-based compensation from insurance carriers, or through EHG Insurance Brokerage LLC, when clients or other individuals purchase insurance products through him. This compensation is separate from, and in addition to, the advisory fees clients pay to EHG Wealth Management LLC and creates an incentive for Mr. Herring to recommend insurance products based on the compensation he may receive rather than solely on a client's needs.

EHG Wealth Management LLC mitigates this conflict through its Code of Ethics, disclosure obligations, and the supervisory procedures described in Item 7 below, including the Firm's review of outside business activities and related compensation arrangements.

Other than as described above, no person or entity who is not a client provides Jason Herring with an economic benefit (such as sales awards, bonuses tied to new assets, or other non-cash compensation) for providing advisory services to clients of EHG Wealth Management LLC.

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ITEM 7 — SUPERVISION

Anthony G. DeCicco, Co-Founder & President of EHG Wealth Management LLC, is responsible for supervising Jason Herring's advisory activities, including the investment advice he provides to clients, his outside business activities, and his adherence to the Firm's Code of Ethics, Compliance Manual, and Written Supervisory Procedures.

Supervision is carried out through, among other things: periodic review of client accounts, recommendations, and advisory agreements; review of correspondence and electronic communications; monitoring and pre-approval of outside business activities and additional compensation arrangements, including those described in Items 5 and 6 of this supplement; and ongoing oversight of licensing, registration, and continuing education requirements.

SUPERVISOR	Anthony G. DeCicco, Co-Founder & President
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Clients with questions about the supervision of Mr. Herring, or who wish to report a concern about his advisory activities, may contact the supervisor listed above at any time.

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