



DOGWOOD
WEALTH MANAGEMENT

Dogwood Wealth Management, LLC
7900 College Blvd.
Suite 118
Overland Park, Kansas 66221
Phone: 913-232-2900

Jason R. Newcomer, CFP[®], AIF[®], EA[®]

Principal and Chief Compliance Officer

Individual CRD No. 5563175

Form ADV Part 2B – Brochure Supplement

Effective: 03/02/2023

This Form ADV Part 2B (“Brochure Supplement”) provides information about the background and qualifications of Jason R. Newcomer as a supplement to the information contained in Dogwood Wealth Management’s (referred to as “we,” “our,” “us,” “Firm,” “Advisor,” or “Dogwood Wealth”) Form ADV Part 2A Disclosure Brochure. You should have received a copy of that Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of Dogwood Wealth’s Disclosure Brochure or this Brochure Supplement, please contact Dogwood Wealth at (913) 232-2900.

Additional information about Mr. Newcomer is available on the SEC’s Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov. The site is searchable by a unique identifying number known as a CRD number. Mr. Newcomer’s CRD number is 5563175.

Item 2: Educational Background and Business Experience

EDUCATIONAL BACKGROUND

Jason R. Newcomer, born in 1987, is dedicated to advising clients of Dogwood Wealth Management as Principal and Chief Compliance Officer. Mr. Newcomer earned his Bachelor of Science degree from Missouri State University in 2010. Additional information regarding Mr. Newcomer's business background is included below.

BUSINESS BACKGROUND

02/2022 - Present	Dogwood Wealth Management, LLC	Principal, Chief Compliance Officer
05/2009 – 02/2022	Barber Financial Group	Investment Advisor Representative

PROFESSIONAL DESIGNATIONS AND LICENSES

CERTIFIED FINANCIAL PLANNER™ (“CFP®”)

The program is administered by the Certified Financial Planner Board of Standards Inc. Those with the CFP® designation have demonstrated competency in all areas of finance related to financial planning. Candidates complete studies on over 100 topics, including stocks, bonds, taxes, insurance, retirement planning and estate planning. In addition to passing the CFP® certification exam, candidates must also complete qualifying work experience, agree to adhere to the CFP Board's code of ethics and professional responsibility and financial planning standards and complete 30 hours of continuing education every two years.

ENROLLED AGENT – EA

An enrolled agent is a person who has earned the privilege of practicing, or representing taxpayers, before the IRS. Enrolled agents, like attorneys and certified public accountants (CPAs), are unrestricted as to which taxpayers they can represent and what types of tax matters they can handle. Enrolled Agents advise, represent, and prepare tax returns for individuals, partnerships, corporations, estates, trusts, and any entities with tax-reporting requirements. Enrolled Agents' expertise in the continually changing field of taxation enables them to effectively represent taxpayers audited by the IRS. To become an Enrolled Agent an applicant must pass the Special Enrollment Examination. This exam is a three-part exam that includes: Part 1 – Individual; Part 2 – Business; Part 3 – Representation, Practice and Procedures. All of the questions are weighted equally, and the test is graded on a bell curve so the number of students that pass is limited. A background check and review of tax compliance is conducted. The IRS also requires 72 hours of continuing professional education every three years. Enrolled Agents are required to abide by the provisions of the Department of Treasury's Circular 230, which provides the regulations governing the practice of Enrolled Agents before the IRS.

ACCREDITED INVESTMENT FIDUCIARY™ (“AIF®”)

The AIF® mark is held by the Center for Fiduciary Studies, LLC, a Fiduciary360 (fi360) company.

The professional designations awarded by fi360 demonstrate the focus on all the components of a comprehensive investment process, related fiduciary standards of care, and commitment to excellence. AIF® designees undergo an initial training program, annual continuing education, and pledge to abide by the designation's code of ethics. Since October 2002, the Accredited Investment Fiduciary™ (AIF®) designation has been the mark of commitment to a standard of fiduciary investment excellence. Those who earn the AIF® mark successfully complete a specialized program on investment fiduciary standards of care and subsequently passed a comprehensive examination. AIF® designees demonstrate a thorough understanding of fi360's Prudent Practices for investment advisors and stewards.

Item 3: Disciplinary Information

There are no legal, civil, or disciplinary events to disclose regarding Mr. Newcomer. Mr. Newcomer has never been involved in any investment related regulatory, civil, or criminal action. There have been no client complaints, lawsuits, arbitration claims or administrative proceedings against Mr. Newcomer.

Securities laws require an advisor to disclose any instances where the advisor or its advisory persons have been found liable in a legal, regulatory, civil or arbitration matter that alleges violation of securities and other statutes; fraud; false statements or omissions; theft, embezzlement or wrongful taking of property; bribery, forgery, counterfeiting, or extortion; and/or dishonest, unfair, or unethical practices. **As previously noted, there are no legal, civil, or disciplinary events to disclose regarding Mr. Newcomer.**

However, we do encourage you to independently view the background of Mr. Newcomer on the Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching with his full name or his Individual CRD No. 5563175.

Item 4: Other Business Activities

Jason R. Newcomer is dedicated to servicing the clients of Dogwood Wealth Management and does not engage in any other business activities.

Item 5: Additional Compensation

Jason R. Newcomer does not receive any economic benefit from any person, company, or organization, in exchange for providing clients advisory services through Dogwood Wealth Management, LLC.

Item 6: Supervision

Supervision of Mr. Newcomer is performed by himself in his capacity as Chief Compliance Officer of Dogwood Wealth. Dogwood Wealth has implemented a policies and procedures manual and Code of Ethics which guides the Firm and its supervised persons in meeting their fiduciary obligations to Dogwood Wealth's clients when providing investment advisory services. As Dogwood Wealth's Chief Compliance Officer, Mr. Newcomer is responsible for the implementation of the Firm's policies and procedures and Code of Ethics. Mr. Newcomer may be contacted at (913) 232-2900 for more information about this Brochure Supplement.

Additionally, Dogwood Wealth is subject to regulatory oversight by various agencies. These agencies require registration by Dogwood Wealth and its supervised persons. As a registered entity, Dogwood Wealth is subject to examinations by regulators, which can be announced or unannounced. Dogwood Wealth is required to periodically update the information provided to these agencies and to provide various reports regarding the business activities and assets of the Firm.



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Eric J. Sheerin, AIF[®], RFC[®]

Principal and Investment Advisor Representative

Individual CRD No. 4786798

Form ADV Part 2B – Brochure Supplement

Effective: 03/02/2023

This Form ADV Part 2B (“Brochure Supplement”) provides information about the background and qualifications of Eric J. Sheerin as a supplement to the information contained in Dogwood Wealth Management’s (referred to as “we,” “our,” “us,” “Firm,” “Advisor,” or “Dogwood Wealth”) Form ADV Part 2A Disclosure Brochure. You should have received a copy of that Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of Dogwood Wealth’s Disclosure Brochure or this Brochure Supplement, please contact Dogwood Wealth at (913) 232-2900.

Additional information about Mr. Sheerin is available on the SEC’s Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov. The site is searchable by a unique identifying number known as a CRD number. Mr. Sheerin’s CRD number is 4786798.

Item 2: Educational Background and Business Experience

EDUCATIONAL BACKGROUND

Eric. J. Sheerin, born in 1977, is dedicated to advising clients of Dogwood Wealth Management as a Principal and Investment Advisor Representative. Mr. Sheerin earned his Bachelor of Science degree in Marketing and International Business from Kansas State University in 2001. Additional information regarding Mr. Sheerin's business background is included below.

BUSINESS BACKGROUND

02/2022 - Present	Dogwood Wealth Management, LLC	Principal, Investment Advisor Representative
08/2016 – 03/2022	Mutual Securities, Inc.	Registered Representative
01/2011 – 02/2022	Barber Financial Group	Investment Advisor Representative

PROFESSIONAL DESIGNATIONS AND LICENSES

Registered Financial Consultant™ ("RFC®")

Registered Financial Consultant™ ("RFC®") is a professional designation awarded by the International Association of Registered Financial Consultants™ ("IARFC®") to those financial advisors who meet specific standards of education, experience, and integrity. Prerequisites for the RFC® designation are; a baccalaureate or graduate degree in financial planning or services with strong emphasis on subjects relating to economics, accounting, business, statistics, finance, and similar studies; or have earned one of the following professional degrees or designations: AMS, CFA®, CFP®, ChFC®, CLU®, CPA®, EA®, JD®, or completed an IARFC® or CFP®, approved curriculum at an accredited college or university; must meet local licensing requirements securities, life, and health insurance; or operate as a fee-only planner, have no suspension or revocation of any professional license; subscribe and adhere to the RFC® Code of Ethics; must agree to devote a minimum of 40 hours per year of professional continuing education in the field of personal finance and professional practice management; and annually attest to the continued compliance and operation of the RFC® Code of Ethics.

ACCREDITED INVESTMENT FIDUCIARY™ ("AIF®")

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The professional designations awarded by fi360 demonstrate the focus on all the components of a comprehensive investment process, related fiduciary standards of care, and commitment to excellence. AIF® designees undergo an initial training program, annual continuing education, and pledge to abide by the designation's code of ethics. Since October 2002, the Accredited Investment Fiduciary™ (AIF®) designation has been the mark of commitment to a standard of fiduciary investment excellence. Those who earn the AIF® mark successfully complete a specialized program on investment fiduciary standards of care and subsequently passed a comprehensive examination. AIF® designees demonstrate a thorough understanding of fi360's Prudent Practices for investment advisors and stewards.

Item 3: Disciplinary Information

There are no legal, civil, or disciplinary events to disclose regarding Mr. Sheerin. Mr. Sheerin has never been involved in any investment related regulatory, civil, or criminal action. There have been no client complaints, lawsuits, arbitration claims or administrative proceedings against Mr. Sheerin.

Securities laws require an advisor to disclose any instances where the advisor or its advisory persons have been found liable in a legal, regulatory, civil or arbitration matter that alleges violation of securities and

other statutes; fraud; false statements or omissions; theft, embezzlement or wrongful taking of property; bribery, forgery, counterfeiting, or extortion; and/or dishonest, unfair, or unethical practices. **As previously noted, there are no legal, civil, or disciplinary events to disclose regarding Mr. Sheerin.**

However, we do encourage you to independently view the background of Mr. Sheerin on the Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching with his full name or his Individual CRD No. 4786798.

Item 4: Other Business Activities

Eric J. Sheerin is dedicated to servicing the clients of Dogwood Wealth Management and does not engage in any other business activities.

Item 5: Additional Compensation

Eric J. Sheerin does not receive any economic benefit from any person, company, or organization, in exchange for providing clients advisory services through Dogwood Wealth Management, LLC.

Item 6: Supervision

Supervision of Mr. Sheerin is performed by Jason Newcomer in his capacity as Chief Compliance Officer of Dogwood Wealth. Dogwood Wealth has implemented a policies and procedures manual and Code of Ethics which guides the Firm and its supervised persons in meeting their fiduciary obligations to Dogwood Wealth's clients when providing investment advisory services. As Dogwood Wealth's Chief Compliance Officer, Mr. Newcomer is responsible for the implementation of the Firm's policies and procedures and Code of Ethics. Mr. Newcomer may be contacted at (913) 232-2900 for more information about this Brochure Supplement.

Additionally, Dogwood Wealth is subject to regulatory oversight by various agencies. These agencies require registration by Dogwood Wealth and its supervised persons. As a registered entity, Dogwood Wealth is subject to examinations by regulators, which can be announced or unannounced. Dogwood Wealth is required to periodically update the information provided to these agencies and to provide various reports regarding the business activities and assets of the Firm.