

EagleStone Wealth Advisors, Inc.
d/b/a: EagleStone Tax & Wealth Advisors

December 4, 2024

Exhibit to Form CRS

EagleStone Tax & Wealth Advisors is required to update its Form CRS when information in the Form CRS becomes materially inaccurate. This Exhibit summarizes the following material changes to the firm's Form CRS, implemented on December 4, 2024:

The material changes to our Form CRS include the disclosure of an ongoing regulatory investigation of our firm:

The firm is currently engaged in a regulatory investigation, which focuses on the handling of a client complaint regarding an IAR's breach of fiduciary duty, fee practices, and management. As part of this process, the investigation may also review the firm's supervision of related business practices.