

Daniel Reeves

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

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**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Daniel Reeves that supplements the EagleStone Tax & Wealth Advisors brochure. You should have received a copy of that brochure. Contact us at 301-924-2160 if you did not receive EagleStone Tax & Wealth Advisors's brochure or if you have any questions about the contents of this supplement.

Additional information about Daniel Reeves (CRD # 7325963) is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Daniel Reeves

Year of Birth: 1997

Formal Education After High School:

- University of Maryland, BA Economics, 8/2015 - 12/2018

Business Background:

- Eaglestone Tax & Wealth Advisors, Investment Adviser Representative, 09/2023 - Present
- Eaglestone Tax & Wealth Advisors, Financial Analysts/Customer Service Associate, 1/2021 - Present
- Emerson Equity LLC, Registered Representative, 6/2023 - Present
- Unemployed due to COVID, Student, 4/2020 - 12/2020
- Bethesda Soccer Club, Head Soccer Coach, 6/2019 - 3/2020
- UMD Division of Student Affairs - Office of Dev. & External Rel., Development Coordinator, 2/2019 - 2/2020
- University of Maryland, Full-Time Education, 8/2015 - 12/2018
- University of Maryland Soccer - Camp, Camp Counselor, 6/2015 - 7/2018

Item 3 Disciplinary Information

Form ADV Part 2B requires disclosure of certain criminal or civil actions, administrative proceedings, and self-regulatory organization proceedings, as well as certain other proceedings related to suspension or revocation of a professional attainment, designation, or license. Mr. Daniel Reeves has no required disclosures under this item.

Item 4 Other Business Activities

Daniel Reeves is a Registered Representative with Emerson Equity LLC. Emerson Equity LLC is a diversified financial services company engaged in the sale of specialized investment products. In this capacity, Mr. Reeves may recommend securities or insurance products offered by Emerson Equity LLC as part of your investment portfolio. If you purchase these products through Mr. Reeves, he will receive the customary commissions in his separate capacity as a Registered Representative of Emerson Equity LLC.

Additionally, Mr. Reeves could be eligible to receive incentive awards such as Emerson Equity LLC may offer. He will also receive 12b-1 fees from mutual funds that pay such fees. The receipt of additional compensation will give Mr. Reeves an incentive to recommend investment products based on the compensation received, rather than on your investment needs.

Daniel Reeves has a fiduciary duty to act in your best interest when acting in an investment adviser representative capacity, including the duty to seek best execution. Therefore, our Company's mutual fund selection and recommendation process takes into consideration several factors in order to meet this requirement. See the ADV Part 2A Brochure, the *Brokerage Practices* section, for additional information on our mutual fund share class selection process.

As stated above, persons providing investment advice to advisory clients on behalf of our firm are registered representatives with Emerson Equity LLC. In their capacity as registered representatives, these persons receive compensation in connection with the purchase and sale of securities or other investment products, including asset-based sales charges, service fees or 12b-1 fees for the sale or holding mutual funds. Compensation earned by these persons in their capacities as registered representatives is separate and in addition to our advisory fees. This practice presents a conflict of

interest because persons providing investment advice to advisory clients on behalf of our firm who are registered representatives have an incentive to recommend investment products based on the compensation received rather than solely based on your needs. Persons providing investment advice to advisory clients on behalf of our firm can select or recommend, and in many instances will select or recommend, mutual fund investments in share classes that pay 12b-1 fees when clients are eligible to purchase share classes of the same funds that do not pay such fees and are less expensive. This presents a conflict of interest. You are under no obligation, contractually or otherwise, to purchase securities products through a person affiliated with our firm.

Item 5 Additional Compensation

Refer to the *Other Business Activities* section above for disclosures on Mr. Reeves's receipt of additional compensation as a result of his other business activities.

Also, refer to the *Fees and Compensation, Client Referrals and Other Compensation, and Other Financial Industry Activities and Affiliations* section(s) of EagleStone Tax & Wealth Advisors's firm brochure for additional disclosures on this topic.

Item 6 Supervision

In the supervision of our associated persons, advice provided is limited based on the restrictions set by EagleStone Tax & Wealth Advisors, and by internal decisions as to the types of investments that may be included in client portfolios. We conduct periodic reviews of client holdings and documented suitability information to provide reasonable assurance that the advice provided remains aligned with each client's stated investment objectives and with our internal guidelines.

My supervisor is: Tarun Mehta, President and Chief Compliance Officer

Supervisor phone number: 301-917-9309