

Item 1 - Cover Page

# Form ADV Part 2A Brochure

## Canvas Wealth Advisors LLC

Home Office: 6136 Nieman Road, Shawnee, KS 66203

Branch Office: 1133 East 2nd Street N, Wichita, KS 67214

[www.canvaswealthadvisors.com](http://www.canvaswealthadvisors.com)

913-991-8471

July 31, 2024

This Brochure provides information about the qualifications and business practices of Canvas Wealth Advisors LLC (CWA). If you have any questions about the contents of this Brochure, please contact us at 913-991-8471. The information in this Brochure has not been approved or verified by the United States Securities and Exchange Commission or any state securities authority.

CWA is a registered investment adviser. Registration as an investment adviser does not imply any level of skill or training. The oral and written communications of an adviser provide you with information from which you can determine whether to hire or retain an Adviser.

Additional information about CWA is also available via the SEC's web site [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## **Item 2 – Material Changes**

This Brochure, dated July 31, 2024, represents an amendment to the Brochure for Canvas Wealth Advisors, LLC.

Since the filing of the firm’s annual update Brochure dated March 28, 2024, subsequently amended June 13, 2024, we have added more detail about commercial real estate investment activities the firm now provides to qualified clients. We have also made various other minor updates to the Brochure but no other material changes were made.

Pursuant to SEC Rules, we will deliver to you a summary of any material changes to this and subsequent Brochures within 120 days of the close of our fiscal year. We may further provide other ongoing disclosure information about material changes as necessary. All such information will be provided to you free of charge.

Currently, our Brochure may be requested by contacting us at 913-991-8471.

Additional information about CWA is also available via the SEC’s web site [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov). The SEC’s web site also provides information about any persons affiliated with CWA who are registered as investment adviser representatives of CWA.

### Item 3 - Table of Contents

Item 1 – Cover Page.....	i
Item 2 – Material Changes .....	ii
Item 3 - Table of Contents.....	iii
Item 4 – Advisory Business .....	1
Item 5 – Fees and Compensation .....	3
Item 6 – Performance-Based Fees and Side-By-Side Management.....	4
Item 7 – Types of Clients.....	4
Item 8 – Methods of Analysis, Investment Strategies and Risk of Loss .....	5
Item 9 – Disciplinary Information.....	6
Item 10 – Other Financial Industry Activities and Affiliations .....	6
Item 11 – Code of Ethics .....	6
Item 12 – Brokerage Practices .....	7
Item 13 – Review of Accounts .....	9
Item 14 – Client Referrals and Other Compensation.....	10
Item 15 – Custody.....	11
Item 16 – Investment Discretion.....	11
Item 17 – Voting Client Securities.....	12
Item 18 – Financial Information.....	12
Brochure Supplement(s)	

## **Item 4 – Advisory Business**

Canvas Wealth Advisors LLC (CRD # 306343), (CWA), is registered as an investment adviser with the Securities and Exchange Commission. The firm also provides services specialized for high net worth clientele. CWA is based in the State of Kansas and was organized as a limited liability company under the laws of the State of Delaware. The firm has been in business since 2019 and currently has 6 employees and associated persons.

CWA's principal office and place of business is located at 6136 Nieman Road, Shawnee, KS 66203. The firm also has a branch office located at 1133 East 2<sup>nd</sup> Street N, Wichita, KS 67214. Regular business hours are from 8:00am to 5:00pm Monday through Friday. The firm can be contacted by phone at 913-991-8471.

The firm was co-founded and is primarily owned by Scott R. Wesley and Drew R. Waldron. Mr. Waldron serves as the Chief Compliance Officer of the firm.

### **Investment Management Services**

CWA provides ongoing discretionary portfolio management services to individuals, families and businesses. When providing portfolio management services, the firm not only has full discretion to make recommendations related to investments without client approval, but also implements these recommendations and provides ongoing monitoring and reporting. In some cases, the firm may delegate certain investment management responsibilities to outside managers under a third-party or sub-advisory management arrangement.

CWA also provides ongoing portfolio management services to private real estate investment funds. In these engagements, the firm invests the funds of such vehicles in private real estate projects consistent with the operating agreement of the applicable vehicle, but also provides ongoing monitoring and reporting. The firm generally delegates development to outside parties but manages administrative tasks internally. The firm may recommend investments in these private funds to its retail clients, but clients are under no obligation to invest unless they choose to do so.

As of December 31, 2023, the firm had over \$527,200,419 in assets under management, all of which was managed on a discretionary basis.

## **Financial Planning and Consulting Services**

Additionally, the firm provides project oriented and ongoing financial planning services in conjunction with investment management services detailed above or on a stand alone basis. For example, the firm offers advice or other strategic assistance in areas such as education funding, retirement planning, estate planning, risk management, employee benefits planning, tax planning, etc. When engaged to provide financial planning assistance, clients are responsible for determining whether or not to implement a recommendation, and if they decide to do so, are responsible for implementation. The details of an engagement vary on a case by case basis depending on the complexity of the client's financial situation. More comprehensive engagements, however, involve identification of goals and objectives, collection and analysis of data, formulation of a strategy, and preparation of a written plan.

## **General Information**

The firm does not provide a "wrap fee" investment management program, although outside managers recommended or used by the firm may do so. For information regarding such programs provided by outside managers, please refer to the applicable outside manager's ADV Part 2 Disclosure Brochure which is available upon request.

Because CWA is a registered investment adviser, the firm is required to meet certain fiduciary standards when providing investment advice to clients. Additionally, when we provide investment advice related to a retirement plan account or an individual retirement account, we are considered fiduciaries within the meaning of Title I of the Employee Retirement Income Security Act and/or the Internal Revenue Code, as applicable, which are laws governing retirement accounts. As such, we are required to act in your best interest and not put our interest ahead of yours, even though our compensation creates some conflicts with your interests in that the more you have us manage, the more we can earn. Our clients however are under no obligation to use services recommended by our associated persons. Furthermore, we believe that our recommendations are in the best interests of our clients and are consistent with our clients' needs.

## **Item 5 – Fees and Compensation**

### **Investment Management Services**

Fees for wealth management services are generally based on account size and level of service provided at an annual fee of up to 1% subject to a minimum \$5,000 annual fee.

In instances where (i) CWA delegates investment management authority to outside investment managers any additional management fees paid by the client must be approved by the client in advance. Details about outside managers, their services, fee, etc., are addressed in the applicable manager's Form ADV Part 2 Disclosure Brochure which is available upon request.

Fees will generally be deducted in advance via an automatic withdrawal on a quarterly basis, i.e. one-fourth of the annual fee will be deducted each quarter. Fees will be calculated for and deducted from each account at the beginning of each quarter for that quarter based on the balance of each respective account as reported by the custodian as of the end of the previous quarter. Value of assets not reported by the custodian will be estimated on a case by case basis. Value of interests in private funds will generally be reported at cost or pursuant to an independent third party valuation.

Although fees are generally deducted from accounts, clients may with the firm's approval elect to instead pay fees by check, ACH transfer, or wire transfer.

Fees paid to outside managers are generally deducted directly from client accounts by CWA or the outside manager. Timing of fee deductions related to outside managers vary but are addressed in the applicable account opening documentation in advance.

### **Financial Planning and Consulting Services**

Although CWA may provide financial planning and consulting services to clients as part of an investment management engagement, the firm may also provide such services on a stand alone basis. In these instances, clients may be charged a fixed fee ranging from \$1500 - \$100,000 or may be charged on an hourly basis generally at \$100 - \$300 per hour, depending on the type and complexity of services to be provided. Fees are generally billed in arrears but may in some instances be partially billed in advance with the balance billed in arrears upon completion. Fees can be paid by check, ACH transfer, or wire transfer. As mentioned above, CWA may provide financial planning and services on a complimentary basis as part of an investment management engagement. The fees and scope of service for

which a fee will be charged will be documented and agreed upon before commencement of services.

### **General Information**

Services may be terminated upon 30 days written notice, and unearned fees paid in advance for partial periods will be prorated and refunded to client subject to the termination notice provisions of the client agreement. Fees for new accounts will be billed in advance based on the account beginning balance and will be prorated based on the number of days assets will be under management. Fees for withdrawals out of an account will be prorated and refunded based on the number of days assets were under management. Fees for deposits into an account will be prorated and charged at the firm's discretion based on the number of days assets will be under management.

All fees paid to CWA are separate and unrelated to any trading costs, or fees or expenses assessed by mutual funds, exchange traded funds, brokers or custodians. Details about outside managers, their services, fee, etc., are addressed in the applicable manager's Form ADV Part 2 Disclosure Brochure which is available upon request.

### **Item 6 – Performance-Based Fees and Side-By-Side Management**

Although its fees are often asset based, CWA does not charge additional performance-based fees (fees based on a share of capital gains on or capital appreciation of the assets of a client) and consequently does not simultaneously manage performance based and non performance based accounts.

### **Item 7 – Types of Clients**

CWA provides portfolio management services to individuals, trusts, estates, charitable organizations, business entities and private real estate funds. The minimum account size for portfolio management services is generally \$500,000, although accounts not meeting the minimum may be accepted on a case-by-case basis. CWA also generally requires a minimum \$5,000 annual fee which may be waived at the firm's discretion.

## **Item 8 – Methods of Analysis, Investment Strategies and Risk of Loss**

When providing investment management services, investment strategies may be established by representatives of CWA, or may be established by outside managers to whom management may be delegated.

CWA's general investment strategy is to attempt to reduce risk and volatility by building diversified portfolios in a manner consistent with the tenets of modern portfolio theory. To implement this strategy, CWA and its representatives may use fundamental security methods of analysis, market trend analysis, and economic cycle analysis. While mutual funds, exchange traded funds, stocks and bonds are the primary investment vehicles used in or recommended for client accounts, we may also use or recommend various other investment vehicles in the implementation of our strategies, including illiquid private fund interests, long-term purchases (securities held at least a year), short-term purchases (securities sold within a year), and trading (securities sold with 30 days).

For information regarding investment strategies and methods of analysis used by third party managers, please refer to the applicable manager's ADV Part 2 Disclosure Brochure which is available upon request.

Investing in securities involves risk of loss that clients should be prepared to bear. Such risks include market risk, interest rate risk, currency risk, liquidity risk, and political risk, and loss of capital, among others. Additionally, certain trading strategies can affect investment performance through increased brokerage fees and other transactions. Risks related to private real estate funds include general market risk, real estate market risk, management risk, project risk, liquidity risk, conflict of interest risk, environmental risk, political risk, economic risk, financial risk, labor risk, credit market risk, and geographic risk, among others. See the applicable fund documents for addition detail related to such risks.

Although CWA intends to manage risk through the careful selection of investments, no investment strategy can assure a profit or avoid a loss.



## **Item 9 – Disciplinary Information**

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to the evaluation of the firm or the integrity of our management. CWA is currently not subject to, nor has ever been subject to, any legal or disciplinary events of a material nature.

## **Item 10 – Other Financial Industry Activities and Affiliations**

### *Private Real Estate Fund Activities*

CWA serves as Administrative Manager for and provides various services to certain private real estate funds formed as Limited Liability Companies which invest in commercial real estate limited partnership and preferred equity offerings. CWA makes investment in such private funds available to certain qualified clients of the firm and charges its management fee to participating clients for such funds as it would for other assets held by such clients. Although CWA receives its management fees and CWA affiliated persons receive certain other fees related to such funds, clients are made aware of all such compensation arrangements in advance. Furthermore, clients are not required to participate in real estate investment vehicles formed and or managed by CWA.

CWA has no other financial industry activities or affiliations.

## **Item 11 – Code of Ethics**

### **Code of Ethics**

CWA has adopted a Code of Ethics expressing the firm's commitment to ethical conduct. CWA's Code of Ethics describes the firm's fiduciary duties and responsibilities to clients, and details practices for reviewing the personal securities transactions of supervised persons with access to client information. The Code also requires compliance with applicable securities laws, addresses insider trading, and details possible disciplinary measures for violations. CWA will provide a complete copy of its Code of Ethics to any client upon request to the Chief Compliance Officer.

## **Trading Conflicts of Interest**

Individuals associated with CWA are permitted to buy or sell securities for their personal accounts identical to or different than those recommended to clients. However, no person employed by CWA is allowed to favor his or her own interest over that of a client or make personal investment decisions based on the investment decisions of advisory clients.

In order to address potential conflicts of interest, CWA requires that associated persons with access to advisory recommendations provide annual securities holdings reports and quarterly transaction reports to the firm's Chief Compliance Officer.

## **Item 12 – Brokerage Practices**

### ***The Custodian and Brokers We Use***

CWA does not maintain physical custody of client assets. Instead, we require all client assets be maintained in an account at a non-affiliated “qualified custodian,” generally a broker-dealer or bank. The qualified custodian we use varies depending on the type of service provided.

While we may recommend that you use a particular suggested custodian or broker, you will ultimately decide whether to do so and will open your account by entering into an account agreement directly with them. We do not actually open accounts for you, although we can assist you in doing so.

### ***How We Select Custodians and Brokers***

In determining to associate with a custodian or broker for our clients, we consider many different factors including quality of service, types of services offered, overall capability, execution quality, competitiveness of transaction costs, availability of investment research, reputation, stability and financial resources, among other things. In determining the reasonableness of a broker’s compensation, we consider the overall cost to clients relative to the benefits clients receive, both directly and indirectly, from the broker.

### **Your Brokerage and Custody Costs**

Our clients receive various services directly from our custodians. For our clients’ accounts that our custodians maintain, the custodian generally does not charge separately for

custody services but instead is compensated by charging commissions or other fees on trades that it executes or trades that are executed by other brokers to and from the custodial accounts. Our relationship to our custodians and the custodian's relationship to the client are entirely independent of trade commission assessed by the custodian in client accounts.

Since our custodians charge you a fee for each trade that we have executed by a different broker-dealer, we have the custodian execute most trades for your account in order to minimize your trading costs.

We have determined that having the custodian execute most trades is consistent with our duty to seek "best execution" of your trades. Best execution means seeking the most favorable terms for a transaction based on all relevant factors, including those listed above.

#### Products and Services Available to Us from Brokers/Custodians

Our custodians provide us and our clients with access to its institutional brokerage services like trading, custody, reporting, and related services, many of which are not typically available to retail customers. Our custodians also make available various support services, some of which may help us manage or administer our clients' accounts, while others may help us manage and grow our business.

Our custodians' institutional brokerage services which benefit you directly include access to a broad range of investment products, execution of securities transactions, and asset custody. The investment products available through our custodians include some to which we might not otherwise have access or that would require a significantly higher minimum initial investment by our clients.

Our custodians also make available to us other products and services that benefit us but may not directly benefit you or your account. These products and services assist us in managing and administering our clients' accounts. They include investment research, both the custodian's own and that of third parties. We may use this research to service all or a substantial number of our clients' accounts, including accounts not maintained at the custodian. In addition to investment research, the custodians also make available software and other technology that provide access to client account data, facilitate trade execution for multiple client accounts, provide pricing and other market data, facilitate payment of our fees from our clients' accounts, and assist with back-office functions, recordkeeping, and client reporting.

Our custodians also offer other services intended to help us manage and further develop our business. These services include educational conferences and events, consulting on

technology, compliance, legal, and business needs, publications and conferences on practice management and business succession, and access to employee benefits providers, human capital consultants, and insurance providers.

The availability of these services from our custodians benefit us because we do not have to produce or purchase them. Of course, this may give us an incentive to recommend that you maintain your account with our custodians based on our interests rather than yours, which is a potential conflict of interest. We believe, however, that our selection of our custodians is in the best interests of our clients, and is primarily supported by the scope, quality, and price of our custodians' services and not those services that benefit only us.

### **Aggregation of Transactions**

CWA may, from time to time, aggregate client orders into blocks in order to facilitate more efficient account management and execution. When aggregating orders, an average price is given to all participants in the block, or other measures are taken, in order to treat all accounts fairly.

## **Item 13 – Review of Accounts**

### **Reviews of Accounts**

Investment management accounts are supervised by the principals of CWA or the respective third-party manager. In addition to ongoing supervision, accounts are generally reviewed more formally on an annual basis. The quarterly review generally includes assessing client goals and objectives, evaluating the employed strategy, monitoring the portfolio, and addressing the need to rebalance. CWA will periodically, and at least annually, review client's investment policy and risk profile, and discuss the re-balancing of each client's accounts to the extent appropriate.

Additional account reviews may be triggered by a specific client request, by a change in client goals or objectives, by an imbalance in a portfolio asset allocation, or by market or economic conditions. Information about reviews conducted by third party managers may be found in the manager's Form ADV Part 2 Disclosure Brochure, which is available upon request.

All ongoing clients are advised that it remains their responsibility to advise us of any changes in their investment objectives and or financial situation.

## **Regular Reports Provided to Clients**

Investment management clients are provided with account statements from their custodian on at least a quarterly basis which list account holdings and transactions for the period. Investment management clients may also be provided with written performance reports on a quarterly basis that detail current market value, performance relative to market benchmarks, and overall portfolio allocation.

Information about reports provided by third party managers may be found in the manager's Form ADV Part 2 Disclosure Brochure which is available upon request.

## **Item 14 – Client Referrals and Other Compensation**

CWA may pay outside individuals or other professional entities to refer clients to us. Such arrangements are structured to be in compliance with applicable securities laws. For example, clients are provided relevant disclosures prior to or at the time of entering into any advisory contract which describe the specific compensation arrangement. The advisory fee charged to clients will not increase as a result of a referral arrangement.

CWA may also receive referral fees from third party investment managers for referring clients. The receipt of these fees may give us an incentive to make recommendations related to certain third party investment managers which is a conflict of interest. If a client is introduced to a third-party investment manager by us acting as a solicitor we shall disclose the nature of the solicitor relationship, and shall provide each prospective client with a copy of the investment manager's written disclosure statement and a copy of a written solicitor's disclosure statement disclosing the terms and conditions of the arrangement between us (the solicitor) and the third party investment manager.

CWA does not receive direct outside economic benefits such as sales awards or prizes in connection with providing services to clients. CWA does, however, receive economic benefits from our custodian in the form of the support products and services that are made available to us and to other independent investment advisors. These products and services, how they benefit us, and the related conflicts of interest are described in Item 12 above. CWA may however from time to time receive nominal expense reimbursements (e.g. food, beverage, etc.) from service providers participating in CWA sponsored events, or receive administrative expense reimbursements (e.g. legal fees, tax fees, etc.) from third party private fund managers and/or sponsors. The availability to us of these economic

benefits is not contingent upon (although may be associated with) us giving particular investment advice, such as buying or recommending particular securities for our clients. Furthermore, our representatives are required to make all investment decisions and recommendations based solely on the interests of the applicable client.

### **Item 15 - Custody**

As noted in Item 12, CWA does not hold client funds or securities, but instead requires that they be held by a third party custodian. We may however have limited control in some instances to trade on your behalf, to deduct our advisory fees from your account with your authorization, or to request disbursements to you or outside parties (although various types of written authorizations are required depending on the type of disbursements).

You will receive account statements directly from your custodian at least quarterly, which will be sent to the email or postal mailing address you provide. We urge you to carefully review these custodial statements when you receive them and compare them to reports you receive from us.

As mentioned above, CWA also serves as Manager for various private real estate funds formed as Limited Liability Companies which invest in commercial real estate limited partnership and preferred equity offerings. You will receive account statements from an affiliated accounting firm at least quarterly which will be sent to the email or postal mailing address you provide. Investors in vehicles of which CWA is deemed to have custody will receive audited financial statements of the vehicle on an annual basis.

### **Item 16 - Investment Discretion**

CWA will accept discretionary authority to manage securities accounts on behalf of clients, although CWA may in limited instance also accept non-discretionary accounts.

When granted authority to manage accounts, CWA customarily has the authority to determine which securities and the amounts that are bought or sold, or the authority to delegate to third party managers or sub-advisors. Any discretionary authority accepted by CWA however is subject to the client's risk profile and investment objectives, and may be limited by any other limitations provided by the client in writing.

CWA will not exercise any discretionary authority until it has been given authority to do so in writing. Such authority is granted in the written agreement between CWA and the client, and in the written agreement with the third party custodian.

### **Item 17 – Voting Client Securities**

CWA does not vote proxies on behalf of clients. Clients may receive proxies directly from their custodian or transfer agent, and although CWA does not vote proxies, the firm may be contacted with questions about such solicitations.

### **Item 18 – Financial Information**

Registered investment advisers are required in some cases to provide certain financial information and or disclosures about financial condition. For example, if the firm requires prepayment of fees for six months in advance, has custody of client funds, or has a condition that is reasonably likely to impair its ability to meet its contractual commitments to its clients, it may be required to provide financial information and make disclosures.

CWA has no financial or operating conditions which trigger such additional reporting requirements.

# Form ADV Part 2B Brochure Supplement

Scott R. Wesley

Canvas Wealth Advisors LLC

6136 Nieman Road

Shawnee, KS 66203

July 31, 2024

This Brochure Supplement provides information about Scott R. Wesley that supplements the Canvas Wealth Advisors (CWA) Brochure which you should have received. Please contact us at (816) 708-4700 if you did not receive the CWA Brochure or if you have any questions about it or the contents of this supplement.

Additional information about Mr. Wesley is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).



## **Item 2- Educational Background and Business Experience**

Scott R. Wesley, born 1973, cofounded the firm in 2019. Prior to that he was an Investment Advisor Representative for Two West Capital Advisors from 2018 to 2019. Mr. Wesley was a registered representative for MSEC, LLC from 2011 to 2018. Prior to that, he was a registered representative for Purshe Kaplan Sterling Investments, Inc. from 2009 to 2011 and an investment advisor representative for Mariner Wealth Advisors from 2009 to 2011. Mr. Wesley was a financial advisor for Citigroup Global Markets from 2002 to 2009.

Mr. Wesley received his Bachelor of Arts Degree in Business from Baker University in 1999. He attended Des Moines Area Community College from 1993 to 1995

## **Item 3- Disciplinary Information**

Mr. Wesley is currently not subject to, nor has ever been subject to, any legal or disciplinary events reportable under this item.

## **Item 4- Other Business Activities**

Mr. Wesley has no other financial industry affiliations.

## **Item 5- Additional Compensation**

As an owner of the firm, Mr. Wesley receives periodic profit distributions related to the overall performance of the firm. Mr. Wesley does not receive any bonuses, sales awards, or other direct compensation from outside parties in connection with providing advisory services to clients.

## **Item 6 - Supervision**

CWA's Chief Compliance Officer, Drew R. Waldron, provides compliance oversight related to the activities of the firm and its representatives, and can be contacted at the number above regarding Mr. Wesley's activities.

# Form ADV Part 2B Brochure Supplement

Drew R. Waldron, CFP®

Canvas Wealth Advisors LLC

6136 Nieman Road

Shawnee, KS 66203

913-991-8471

July 31, 2024

This Brochure Supplement provides information about Drew R. Waldron that supplements the Canvas Wealth Advisors (CWA) Brochure which you should have received. Please contact us at 913-991-8471 if you did not receive the CWA Brochure or if you have any questions about it or the contents of this supplement.

Additional information about Mr. Waldron is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## **Item 2- Educational Background and Business Experience**

Drew R. Waldron, born 1985, cofounded the firm in 2019 and serves as the firm's Chief Compliance Officer. He was an Investment Advisor Representative for Two West Capital Advisors from 2018 to 2019. Mr. Waldron was an Operations Associate for Mariner Wealth Advisors from 2011 to 2012 and a Wealth Advisor from 2013 to 2018. Prior to that, he was a pricing specialist and senior fund accountant for State Street Corp. from 2008 to 2010.

Mr. Waldron received his Bachelor of Science Degree from the University of Kansas in 2008.

Mr. Waldron earned the Chartered Financial Planner™ (CFP®) designation in 2015. The CERTIFIED FINANCIAL PLANNER™ (CFP®) designation is issued by the Certified Financial Planner Board of Standards, Inc. Candidates are required to complete a CFP-board registered program. They must also pass the CFP Certification Examination, which is comprehensive 6 hour exam. The exam includes case studies and client scenarios designed to test one's ability to correctly diagnose financial planning issues and apply one's knowledge of financial planning to real world circumstances. Certified individuals are required to complete continuing education coursework periodically and agree to be bound by the CFP Board's Code of Ethics and Standards of Conduct. As a prerequisite to sitting for the CFP Certification Examination, candidates must hold a bachelor's degree (or higher) from an accredited college or university and have at least 6000 hours of professional planning experience (or 4000 hours of apprenticeship experience).

## **Item 3- Disciplinary Information**

Mr. Waldron is currently not subject to, nor has ever been subject to, any legal or disciplinary events reportable under this item.

## **Item 4- Other Business Activities**

Mr. Waldron is part owner and manager of FW Ventures, LLC, a residential and commercial real estate company. He spends approximately 20 hours a month during non-security hours on this activity. Mr. Waldron is also partial owner of Charles T. Allen, LLC, a commercial investment real estate company and spends approximately two hours a month during non-security hours on this activity.

Mr. Waldron is a National Board Member for the Society of Financial Service Professionals.

Mr. Waldron has no other financial industry affiliations.

#### **Item 5- Additional Compensation**

As an owner of the firm, Mr. Waldron receives periodic profit distributions related to the overall performance of the firm. Mr. Waldron does not receive any bonuses, sales awards, or other direct compensation in connection with providing advisory services to clients.

#### **Item 6 - Supervision**

Mr. Waldron serves as the Chief Compliance Officer of the firm and provides compliance oversight related to the activities of the firm and its representatives. Mr. Wesley, a co-owner of the firm, can be contacted at the number above regarding Mr. Waldron's activities.

# Form ADV Part 2B Brochure Supplement

Luke D. Ross

Canvas Wealth Advisors LLC

6136 Nieman Road

Shawnee, KS 66203

913-991-8471

July 31, 2024

This Brochure Supplement provides information about Luke D. Ross that supplements the Canvas Wealth Advisors (CWA) Brochure which you should have received. Please contact us at 913-991-8471 if you did not receive the CWA Brochure or if you have any questions about it or the contents of this supplement.

Additional information about Mr. Ross is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## **Item 2- Educational Background and Business Experience**

Luke D. Ross, born 1998, join the firm in 2020 as an Investment Advisor Representative.

Mr. Ross received his Bachelor of Business Administration degree in Finance from the University of Notre Dame in 2020.

## **Item 3- Disciplinary Information**

Mr. Ross is currently not subject to, nor has ever been subject to, any legal or disciplinary events reportable under this item.

## **Item 4- Other Business Activities**

Mr. Ross has no other financial industry affiliations.

## **Item 5- Additional Compensation**

Mr. Ross does not receive any bonuses, sales awards, or other direct compensation from outside parties in connection with providing advisory services to clients.

## **Item 6 - Supervision**

CWA's Chief Compliance Officer, Drew R. Waldron, provides compliance oversight related to the activities of the firm and its representatives, and can be contacted at the number above regarding Mr. Ross' activities.

# Form ADV Part 2B Brochure Supplement

Joshua W. Zach, CFP<sup>®</sup>

Canvas Wealth Advisors LLC

6136 Nieman Road

Shawnee, KS 66203

913-991-8471

July 31, 2024

This Brochure Supplement provides information about Joshua W. Zach that supplements the Canvas Wealth Advisors (CWA) Brochure which you should have received. Please contact us at 913-991-8471 if you did not receive the CWA Brochure or if you have any questions about it or the contents of this supplement.

Additional information about Mr. Zach is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## **Item 2- Educational Background and Business Experience**

Joshua W. Zach, born 1991, joined the firm in 2020 as an Investment Advisor Representative. Prior to that he was a Financial Advisor for Edward Jones from 2018 to 2020, a Coach for the Natural Baseball Academy from 2014 to 2020, a Product Consultant for Cognizant from 2015 to 2018, the Head Varsity Baseball Coach for The Barstow School during 2015, an Import Coordinator for Design Resources, Inc. from 2014 to 2015, and an Intern for the Omaha Storm Chasers during 2014.

Mr. Zach received his Bachelor of Sports Administration degree from the University of Baker in 2014.

Mr. Zach earned the Chartered Financial Planner™ (CFP®) designation in 2022. The CERTIFIED FINANCIAL PLANNER™ (CFP®) designation is issued by the Certified Financial Planner Board of Standards, Inc. Candidates are required to complete a CFP-board registered program. They must also pass the CFP Certification Examination, which is comprehensive 6 hour exam. The exam includes case studies and client scenarios designed to test one's ability to correctly diagnose financial planning issues and apply one's knowledge of financial planning to real world circumstances. Certified individuals are required to complete continuing education coursework periodically and agree to be bound by the CFP Board's Code of Ethics and Standards of Conduct. As a prerequisite to sitting for the CFP Certification Examination, candidates must hold a bachelor's degree (or higher) from an accredited college or university and have at least 6000 hours of professional planning experience (or 4000 hours of apprenticeship experience).

## **Item 3- Disciplinary Information**

Mr. Zach is currently not subject to, nor has ever been subject to, any legal or disciplinary events reportable under this item.

## **Item 4- Other Business Activities**

Mr. Zach has no other financial industry affiliations.



### **Item 5- Additional Compensation**

Mr. Zach receives bonus compensation for generating new clients for the firm. Mr. Zach does not receive any bonuses, sales awards, or other direct compensation from outside parties in connection with providing advisory services to clients.

### **Item 6 - Supervision**

CWA's Chief Compliance Officer, Drew R. Waldron, provides compliance oversight related to the activities of the firm and its representatives, and can be contacted at the number above regarding Mr. Zach's activities.

# Form ADV Part 2B Brochure Supplement

Joseph B. Morrow

Canvas Wealth Advisors LLC

6136 Nieman Road

Shawnee, KS 66203

913-991-8471

July 31, 2024

This Brochure Supplement provides information about Joseph B. Morrow that supplements the Canvas Wealth Advisors (CWA) Brochure which you should have received. Please contact us at 913-991-8471 if you did not receive the CWA Brochure or if you have any questions about it or the contents of this supplement.

Additional information about Mr. Morrow is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## **Item 2- Educational Background and Business Experience**

Joseph B. Morrow, born 1996, joined the firm in 2021 as an Investment Advisor Representative. Prior to that he was a Senior Audit Associate at KPMG, LLP from 2018 to 2021.

Mr. Morrow received his Bachelor of Science Degree in Accounting from the University of Kansas in 2017. He received a Master's Degree in Accounting and Professional Consultancy from Villanova in 2018.

## **Item 3- Disciplinary Information**

Mr. Morrow is currently not subject to, nor has ever been subject to, any legal or disciplinary events reportable under this item.

## **Item 4- Other Business Activities**

Mr. Morrow has no other financial industry affiliations.

## **Item 5- Additional Compensation**

Mr. Morrow received bonus compensation for generating new clients for the firm. Mr. Morrow does not receive any bonuses, sales awards, or other direct compensation from outside parties in connection with providing advisory services to clients.

## **Item 6 - Supervision**

CWA's Chief Compliance Officer, Drew R. Waldron, provides compliance oversight related to the activities of the firm and its representatives, and can be contacted at the number above regarding Mr. Morrow's activities.

# Form ADV Part 2B Brochure Supplement

Reed B. Roney

Canvas Wealth Advisors LLC

6136 Nieman Road

Shawnee, KS 66203

913-991-8471

July 31, 2024

This Brochure Supplement provides information about Reed B. Roney that supplements the Canvas Wealth Advisors (CWA) Brochure which you should have received. Please contact us at 913-991-8471 if you did not receive the CWA Brochure or if you have any questions about it or the contents of this supplement.

Additional information about Mr. Roney is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## **Item 2- Educational Background and Business Experience**

Reed B. Roney, born 2000, joined the firm in 2023 and is an Investment Adviser Representative.

Mr. Roney received his Bachelor of Science Degree in Personal Financial Planning with a Minor in Business from Kansas State University in 2023.

## **Item 3- Disciplinary Information**

Mr. Roney is currently not subject to, nor has ever been subject to, any legal or disciplinary events reportable under this item.

## **Item 4- Other Business Activities**

Mr. Roney has no other financial industry affiliations.

## **Item 5- Additional Compensation**

Mr. Roney receives bonus compensation for generating new clients for the firm. Mr. Roney does not receive any bonuses, sales awards, or other direct compensation from outside parties in connection with providing advisory services to clients.

## **Item 6 - Supervision**

CWA's Chief Compliance Officer, Drew R. Waldron, provides compliance oversight related to the activities of the firm and its representatives, and can be contacted at the number above regarding Mr. Roney's activities.

# Form ADV Part 2B Brochure Supplement

Ryan J. Meda

Canvas Wealth Advisors LLC

6136 Nieman Road

Shawnee, KS 66203

913-991-8471

July 31, 2024

This Brochure Supplement provides information about Ryan J. Meda that supplements the Canvas Wealth Advisors (CWA) Brochure which you should have received. Please contact us at 913-991-8471 if you did not receive the CWA Brochure or if you have any questions about it or the contents of this supplement.

Additional information about Mr. Meda is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## **Item 2- Educational Background and Business Experience**

Ryan J. Meda, born 1992, joined the firm in 2024 and is an Investment Adviser Representative. Prior to that he was a Wealth Management Planning Consultant for Fidelity Brokerage Services, LLC from 2016 to 2024.

Mr. Meda received his Bachelor Business Administration Degree in Marketing from Mississippi State University in 2015.

## **Item 3- Disciplinary Information**

Mr. Meda is currently not subject to, nor has ever been subject to, any legal or disciplinary events reportable under this item.

## **Item 4- Other Business Activities**

Mr. Meda has no other financial industry affiliations.

## **Item 5- Additional Compensation**

Mr. Meda receives bonus compensation for generating new clients for the firm. Mr. Meda does not receive any bonuses, sales awards, or other direct compensation from outside parties in connection with providing advisory services to clients.

## **Item 6 - Supervision**

CWA's Chief Compliance Officer, Drew R. Waldron, provides compliance oversight related to the activities of the firm and its representatives, and can be contacted at the number above regarding Mr. Meda's activities.