



Avondale Wealth Management LLC
DBA Avondale Wealth Advisors
Form ADV Part 2B Supplements

4101 Parkstone Heights Drive, Suite 250
Austin, Texas 78746
512-505-8148

by appointment:
1095 Evergreen Circle, Suite #408
The Woodlands, TX 77380

www.avondalewealth.com

March 2024

This Disclosure Brochure provides information about the following individuals listed below that supplements Avondale Wealth Management LLC's ("Avondale") Form ADV Part 2A Brochure.

- Justin C. Jacobs
- Steven T. Price
- Joanne G. Burks

If you have any questions about the contents of this Disclosure Brochure, please contact us at 512-505-8148 or by email at info@avondalewealth.com.

Additional information about Avondale and its advisory persons are available on the SEC's website at www.adviserinfo.sec.gov.

(Part 2B of Form ADV)

Supervised Person(s):

Justin C. Jacobs

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Purpose of the Brochure Supplement:

This Brochure Supplement provides information about Justin C. Jacobs that supplements the Avondale Wealth Management, LLC Disclosure Brochure document. You should have received a copy of that Disclosure Brochure. Please contact Joanne G. Burks if you did not receive Avondale Wealth Management, LLC's Disclosure Brochure or if you have any questions about the contents of this Brochure Supplement. Additional information about Justin C. Jacobs is available on the SEC's website at www.adviserinfo.sec.gov (the CRD number for Justin C. Jacobs is 4268827).

ITEM 2 - EDUCATIONAL AND BUSINESS EXPERIENCE

Justin C. Jacobs, (b. 1977), CEO and Founder of Avondale Wealth Management, LLC.

Education:

B.S. - Economics - Yale University, 2000

Business Background:

Avondale Wealth Management, LLC	(2010 - Present)
Purshe Kaplan Sterling Investments, Inc.	(2010 - Present)
BBVA Compass Wealth Management.	(2006 – 2010)
Merrill Lynch, Pierce, Fenner & Smith, Inc.	(2000 – 2006)

Groups and Associations:

Board member of Boy Scouts of America
Chairman of the Board for Fellowship of Christian Athletes

ITEM 3 - DISCIPLINARY INFORMATION

Justin C. Jacobs has not had any legal or disciplinary events in his past.

ITEM 4 - OTHER BUSINESS ACTIVITIES

In addition to being investment adviser representatives (hereafter “IA Reps”) of Avondale Wealth Management, LLC (hereafter “Avondale”), Jacobs is licensed as independent insurance agent in Texas. Jacobs makes recommendations on insurance products and also, as an independent insurance agent, sells those recommended insurance products to advisory Clients. When such recommendations or sales are made, a conflict of interest exists as Jacobs earns insurance commissions for the sale of those products, which creates an incentive to recommend such products. Avondale requires that Jacobs disclose this conflict of interest when such recommendations are made. Clients may purchase recommended insurance products from other insurance agents not affiliated with Avondale.

Justin C. Jacobs is a Registered Representative Agent of Purshe Kaplan Sterling Investments, a FINRA registered Broker-dealer. On occasion, he affects transactions on behalf of Clients of Avondale Wealth Management, LLC with respect to the purchase of securities products. The registered representative affecting the transaction receives a commission. Commission payments are made directly to the individual registered representative who effected the transaction. Prior to affecting a transaction, disclosure will be provided to the Client that the registered representative will receive a commission. No compensation is paid to Avondale Wealth Management LLC, Inc. with respect to such transactions.

Justin C. Jacobs is the sole owner of Avondale Holdings LLC, a holding company for owner occupied real estate. This is a passive investment. In addition, Justin C. Jacobs is a member of Peays Jacobs LLC, a company for passive real estate investments. Time spent on these activities is less than 1% of Jacobs’ time.

ITEM 5 - ADDITIONAL COMPENSATION

Aside from the sales commissions paid by insurance companies and/or broker-dealer to Jacobs (see the “OTHER BUSINESS ACTIVITIES” section above), Jacobs doesn’t receive any additional compensation from non-Clients for providing advisory services. All advisory compensation is paid by Clients directly.

ITEM 6 - SUPERVISION:

Joanne Burks, as Chief Compliance Officer, is primarily responsible for the supervision of Avondale Wealth Management, LLC and its IA Reps. Advisory Clients may contact Joanne or any principal at the phone number listed on this brochure.

(Part 2B of Form ADV)

Supervised Person(s):

Steven T. Price

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Purpose of the Brochure Supplement:

This Brochure Supplement provides information about Steven T. Price that supplements the Avondale Wealth Management, LLC Disclosure Brochure document. You should have received a copy of that Disclosure Brochure. Please contact Joanne G. Burks if you did not receive Avondale Wealth Management, LLC's Disclosure Brochure or if you have any questions about the contents of this Brochure Supplement. Additional information about Steven T. Price is available on the SEC's website at www.adviserinfo.sec.gov (the CRD number for Steven T. Price is 6548741).

ITEM 2 - EDUCATIONAL AND BUSINESS EXPERIENCE

Steven T. Price, (b. 1991), VP, Senior Financial Advisor, Avondale Wealth Management, LLC.

Education:

BA in Economics from Wake Forest University, 2014

Business Background:

Avondale Wealth Management, LLC (2015 - Present)

ITEM 3 - DISCIPLINARY INFORMATION

Steven T. Price has not had any legal or disciplinary events in his past.

ITEM 4 - OTHER BUSINESS ACTIVITIES

In addition to being investment adviser representatives (hereafter “IA Reps”) of Avondale Wealth Management, LLC (hereafter “Avondale”), Price is licensed as independent insurance agent in Texas. Price makes recommendations on insurance products and also, as an independent insurance agent, sells those recommended insurance products to advisory Clients. When such recommendations or sales are made, a conflict of interest exists as Price earns insurance commissions for the sale of those products, which creates an incentive to recommend such products. Avondale requires that Price disclose this conflict of interest when such recommendations are made. Also, Clients may purchase recommended insurance products from other insurance agents not affiliated with Avondale. Price is also a managing member of PS128 Properties and a trustee for the STP 2021 Trust.

ITEM 5 - ADDITIONAL COMPENSATION

Aside from the sales commissions paid by insurance companies to Price (see the “OTHER BUSINESS ACTIVITIES” section above), Price doesn’t receive any additional compensation from non-Clients for providing advisory services. All advisory compensation is paid by Clients directly.

ITEM 6 - SUPERVISION

Joanne Burks, as Chief Compliance Officer, is primarily responsible for the supervision of Avondale Wealth Management, LLC and its IA Reps. Advisory Clients may contact Joanne or any principal at the phone number listed on this brochure.

(Part 2B of Form ADV)

Supervised Person(s):

Joanne G. Burks

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Purpose of the Brochure Supplement:

This Brochure Supplement provides information about Joanne G. Burks that supplements the Avondale Wealth Management, LLC Disclosure Brochure document. You should have received a copy of that Disclosure Brochure. Please contact Joanne G. Burks if you did not receive Avondale Wealth Management, LLC's Disclosure Brochure or if you have any questions about the contents of this Brochure Supplement. Additional information about Joanne G. Burks is available on the SEC's website at www.adviserinfo.sec.gov (the CRD number for Joanne Burks is 6872116).

ITEM 2 - EDUCATIONAL AND BUSINESS EXPERIENCE

Joanne G. Burks, (b. 1962), Chief Compliance Officer, CFO, COO, Avondale Wealth Management, LLC.

Education:

BBA in Accounting, University of Texas at Austin (1984)

Business Background:

Avondale Wealth Management, LLC	(2015 - Present)
Purshe Kaplan Sterling Investments	(2015 – Present)
K&N Management	(2014 – 2015)
Hyde Park Baptist Schools	(2009 – 2014)

Groups and Associations:

American Institute of CPA's, Texas Society of CPA's – Austin Chapter
Board Member Christian Youth Theater – Austin

Licenses and Designations:

Texas State Board of Public Accountancy - Certified Public Accountant
American Institute of CPA's - Chartered Global Management Accountant

ITEM 3 - DISCIPLINARY INFORMATION

Joanne Burks has not had any legal or disciplinary events in his past.

ITEM 4 - OTHER BUSINESS ACTIVITIES

None.

ITEM 5 - ADDITIONAL COMPENSATION

None.

ITEM 6 - SUPERVISION

Joanne Burks, as Chief Compliance Officer, is primarily responsible for the supervision of Avondale Wealth Management, LLC and its IA Reps. Justin Jacobs supervises Joanne Burks. Advisory Clients may contact Joanne or Justin at the phone number listed on this brochure.