Wealth Intelligently Navigated, LLC

Form ADV Part 2B Brochure Supplements

SEPTEMBER 2026

Steven Tolleson
Anthony Mahfood
Anna Wolford
Robert Francis
Timothy Few
Alex Spence
Joshua Gallman

26 Parkway Commons Way
Greer, South Carolina 29650

www.winwealthadvisors.com

FORM ADV PART 2B
BROCHURE SUPPLEMENT

Steven Tolleson

MANAGING PRINCIPAL

FIRM **Wealth Intelligently Navigated, LLC**	CRD NUMBER **6276568**
OFFICE ADDRESS **150 E Henry St, Building 2, Floor 3, Spartanburg, SC 29306**	PHONE **(864) 375-4031**

Effective October 14, 2026

This brochure supplement provides information about Steven Tolleson that supplements the Wealth Intelligently Navigated, LLC brochure. You should have received a copy of that brochure. Please contact Steven Tolleson if you did not receive Wealth Intelligently Navigated, LLC's brochure, or if you have questions about this supplement. Mr. Tolleson's CRD number is 6276568.

Additional information about Steven Tolleson is also available on the SEC's website at **www.adviserinfo.sec.gov**.

ITEM 2

Educational Background and Business Experience

Steven Tolleson

Managing Principal

Year of Birth: 1983

BUSINESS BACKGROUND

Wealth Intelligently Navigated, LLC
Managing Principal
March 2026 – Present

Parallel Financial LLC
Investment Advisor Representative
November 2016 – March 2026

EDUCATIONAL BACKGROUND

University of South Carolina – Columbia
Bachelor of Arts in Business/Finance
2011

ITEM 3

Disciplinary Information

Mr. Tolleson does not have any reportable disciplinary disclosures.

ITEM 4

Other Business Activities

Steven Tolleson has a financial industry affiliated business as an independent insurance agent. No more than 30% of his time is spent on these activities. From time to time, he offers clients advice or products from those activities. He may receive separate yet typical compensation in the form of commissions for the sale of insurance products.

These practices represent a conflict of interest because they give Mr. Tolleson an incentive to recommend products based on the commission amount received. This conflict is mitigated by the fact that Mr. Tolleson has a fiduciary responsibility to place the best interest of the client first and the clients are not required to purchase any products. Clients have the option to purchase these products through another insurance agent of their choosing.

ITEM 5

Additional Compensation

Steven Tolleson does not receive any economic benefit from anyone who is not a client for providing advisory services.

ITEM 6

Supervision

Wealth Intelligently Navigated, LLC has written supervisory procedures in place that are reasonably designed to detect and prevent violations of the securities laws, rules, and regulations of the US Investment Advisers Act of 1940, as amended (the “Advisers Act”). Mr. Tolleson is supervised by Wealth Intelligently Navigated, LLC’s Chief Compliance Officer Anna Wolford. Ms. Wolford can be reached at (864) 375-4031.

FORM ADV PART 2B

BROCHURE SUPPLEMENT

Anthony Mahfood

MANAGING PRINCIPAL

FIRM **Wealth Intelligently Navigated, LLC**	CRD NUMBER **2959577**
OFFICE ADDRESS **26 Parkway Commons Way, Greer, South Carolina 29650**	PHONE **(864) 301-4225**

Effective July 1, 2026

This brochure supplement provides information about Anthony Mahfood that supplements the Wealth Intelligently Navigated, LLC brochure. You should have received a copy of that brochure. Please contact Anthony Mahfood if you did not receive Wealth Intelligently Navigated, LLC's brochure, or if you have questions about this supplement. Mr. Mahfood's CRD number is 2959577.

Additional information about Anthony Mahfood is also available on the SEC's website at **www.adviserinfo.sec.gov**.

ITEM 2

Educational Background and Business Experience

Anthony Mahfood

Managing Principal

Year of Birth: 1974

BUSINESS BACKGROUND

Wealth Intelligently Navigated, LLC Managing Principal	July 2026 – Present
Fiduciary Alliance LLC Managing Member	September 2016 – June 2026
Parallel Financial Owner/Principal	March 2013 – June 2026
Lakeview Capital Partners, LLC Managing Member	May 2013 – October 2016

EDUCATIONAL BACKGROUND

University of Tennessee Master of Business Administration in Finance/Operations	2002
John Carroll University Bachelor of Arts in Communications/Business	1997

ITEM 3

Disciplinary Information

Mr. Mahfood does not have any reportable disciplinary disclosures.

ITEM 4

Other Business Activities

Mr. Mahfood is engaged in an outside business activity as an independent insurance agent through Parallel Insurance. In this capacity, he may offer clients insurance products and may receive separate, typical compensation in the form of commissions for the sale of insurance products.

This practice represents a conflict of interest because it gives Mr. Mahfood an incentive to recommend insurance products based on the commission amount received. This conflict is mitigated by the fact that Mr. Mahfood has a fiduciary responsibility to place the best interest of the client first, and clients are not required to purchase any products through Mr. Mahfood or Parallel Insurance. Clients have the option to purchase these products through another insurance agent of their choosing.

ITEM 5

Additional Compensation

Anthony Mahfood does not receive any economic benefit from anyone who is not a client for providing advisory services.

ITEM 6

Supervision

Wealth Intelligently Navigated, LLC has written supervisory procedures in place that are reasonably designed to detect and prevent violations of the securities laws, rules, and regulations of the South Carolina Securities Act. Mr. Mahfood's advisory activities are supervised by Anna Wolford, the Firm's Chief Compliance Officer, who is responsible for reviewing and supervising the securities-related activities of the Firm's Investment Adviser Representatives, including Mr. Mahfood. Anna Wolford can be reached at (864) 375-4031.

ITEM 7

Requirements for State-Registered Advisers

Anthony Mahfood does not have any reportable disciplinary events required to be disclosed in this section.

FORM ADV PART 2B
BROCHURE SUPPLEMENT

Anna Wolford, CFP®

FINANCIAL PLANNER / CCO

FIRM **Wealth Intelligently Navigated, LLC**	CRD NUMBER **7368855**
OFFICE ADDRESS **150 E Henry St, Building 2, Floor 3, Spartanburg, SC 29306**	PHONE **(864) 375-4031**

Effective October 14, 2026

This brochure supplement provides information about Anna Wolford, CFP® that supplements the Wealth Intelligently Navigated, LLC brochure. You should have received a copy of that brochure. Please contact Anna Wolford, CFP® if you did not receive Wealth Intelligently Navigated, LLC's brochure, or if you have questions about this supplement. Mr. Wolford's CRD number is 7368855.

Additional information about Anna Wolford, CFP® is also available on the SEC's website at **www.adviserinfo.sec.gov**.

ITEM 2

Educational Background and Business Experience

Anna Wolford, CFP®

Financial Planner / CCO

Year of Birth: 1992

BUSINESS BACKGROUND

Wealth Intelligently Navigated, LLC Financial Planner / CCO	March 2026 – Present
Parallel Financial LLC Associate Financial Advisor	July 2023 – March 2026
Unemployed	March 2023 – June 2023
Syntrinsic Investment Counsel Associate Consultant	November 2021 – February 2023
Beacon Pointe Advisors, LLC Associate Wealth Advisor	January 2021 – October 2021

EDUCATIONAL BACKGROUND

George Mason University Bachelor of Arts in Foreign Languages	2013

RELEVANT DESIGNATIONS

CERTIFIED FINANCIAL PLANNER™ (CFP®)

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients. Currently, more than 74,000 individuals have obtained CFP® certification in the United States.

To attain the right to use the marks, an individual must satisfactorily fulfill the following requirements:

- **Education –** Earn a bachelor's degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan

development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials.

- **Examination –** Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual's ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.
- **Experience –** Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.
- **Ethics –** Satisfy the Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement and agree to be bound by CFP Board's Code of Ethics and Standards of Conduct ("Code and Standards"), which sets forth the ethical and practice standards for CFP® professionals.

To remain certified, individuals must also complete the following ongoing requirements:

- **Ethics –** Commit to complying with CFP Board's Code and Standards. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.
- **Continuing Education –** Complete 30 hours of continuing education hours every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

ITEM 3

Disciplinary Information

Ms. Wolford does not have any reportable disciplinary disclosures.

ITEM 4

Other Business Activities

Anna Wolford has no other business activities.

ITEM 5

Additional Compensation

Anna Wolford does not receive any economic benefit from anyone who is not a client for providing advisory services.

ITEM 6

Supervision

Wealth Intelligently Navigated, LLC has written supervisory procedures in place that are reasonably designed to detect and prevent violations of the securities laws, rules, and regulations of the US Investment Advisers Act of 1940, as amended (the "Advisers Act"). Ms. Wolford is Wealth Intelligently Navigated, LLC's Chief Compliance Officer, therefore she is responsible for all of the activities that occur on behalf of Wealth Intelligently Navigated, LLC and its clients. Ms. Wolford can be reached at (864) 375-4031.

FORM ADV PART 2B
BROCHURE SUPPLEMENT

Robert Francis

INVESTMENT ADVISER REPRESENTATIVE

FIRM **Wealth Intelligently Navigated, LLC**	CRD NUMBER **6561087**
OFFICE ADDRESS **26 Parkway Commons Way, Greer, South Carolina 29650**	PHONE **(864) 385-7999**

Effective June 1, 2026

This brochure supplement provides information about Robert Francis that supplements the Wealth Intelligently Navigated, LLC brochure. You should have received a copy of that brochure. Please contact Robert Francis if you did not receive Wealth Intelligently Navigated, LLC's brochure, or if you have questions about this supplement. Mr. Francis's CRD number is 6561087.

Additional information about Robert Francis is also available on the SEC's website at **www.adviserinfo.sec.gov**.

ITEM 2

Educational Background and Business Experience

Robert Francis

Investment Adviser Representative

Year of Birth: 1988

BUSINESS BACKGROUND

Wealth Intelligently Navigated, LLC Investment Adviser Representative	June 2026 – Present
Parallel Financial Director, Investment Advisor Representative	January 2026 – June 2026
Goldman Sachs Vice President	September 2021 – December 2025
Deutsche Bank Associate	June 2015 – August 2021

EDUCATIONAL BACKGROUND

University of South Carolina Master of Arts in Economics	2012
University of South Carolina Bachelor of Science in Business Administration	2011

ITEM 3

Disciplinary Information

Mr. Francis does not have any reportable disciplinary disclosures.

ITEM 4

Other Business Activities

Mr. Francis does not have any outside business activities that require disclosure under this Item.

ITEM 5

Additional Compensation

Robert Francis does not receive any economic benefit from anyone who is not a client for providing advisory services.

ITEM 6

Supervision

Wealth Intelligently Navigated, LLC has written supervisory procedures in place that are reasonably designed to detect and prevent violations of the securities laws, rules, and regulations of the South Carolina Securities Act. Mr. Francis' advisory activities are supervised by Anna Wolford, the Firm's Chief Compliance Officer, who is responsible for reviewing and supervising the securities-related activities of the Firm's Investment Adviser Representatives, including Mr. Francis. Anna Wolford can be reached at (864) 375-4031.

ITEM 7

Requirements for State-Registered Advisers

Robert Francis does not have any reportable disciplinary events required to be disclosed in this section.

FORM ADV PART 2B
BROCHURE SUPPLEMENT

Timothy Few

ASSOCIATE

FIRM **Wealth Intelligently Navigated, LLC**	CRD NUMBER **8308057**
OFFICE ADDRESS **150 E Henry St, Building 2, Floor 3, Spartanburg, SC 29306**	PHONE **(864) 375-4031**

Effective October 14, 2026

This brochure supplement provides information about Timothy Few that supplements the Wealth Intelligently Navigated, LLC brochure. You should have received a copy of that brochure. Please contact Timothy Few if you did not receive Wealth Intelligently Navigated, LLC's brochure, or if you have questions about this supplement. Mr. Few's CRD number is Pending.

Additional information about Timothy Few is also available on the SEC's website at **www.adviserinfo.sec.gov**.

ITEM 2

Educational Background and Business Experience

Timothy Few

Associate

Year of Birth: 1994

BUSINESS BACKGROUND

Wealth Intelligently Navigated, LLC Associate	May 2026 – Present
Uber Technologies, Inc. Driver	February 2026 – April 2026
Parallel Financial Associate	July 2025 – April 2026
Robert Half International Executive Recruiter Lead	November 2018 – July 2025
Rocky Moo LLC COO	July 2016 – September 2018

EDUCATIONAL BACKGROUND

University of South Carolina Upstate Business Administration – Accounting and Finance	2017

ITEM 3

Disciplinary Information

Mr. Few does not have any reportable disciplinary disclosures.

ITEM 4

Other Business Activities

Mr. Few does not have any outside business activities that require disclosure under this Item.

ITEM 5

Additional Compensation

Timothy Few does not receive any economic benefit from anyone who is not a client for providing advisory services.

ITEM 6

Supervision

Wealth Intelligently Navigated, LLC has written supervisory procedures in place that are reasonably designed to detect and prevent violations of the securities laws, rules, and regulations of the US Investment Advisers Act of 1940, as amended (the “Advisers Act”). Mr. Few is supervised by Wealth Intelligently Navigated, LLC’s Chief Compliance Officer Anna Wolford. Ms. Wolford can be reached at (864) 375-4031.

FORM ADV PART 2B
BROCHURE SUPPLEMENT

Alex Spence

INVESTMENT ADVISOR REPRESENTATIVE

FIRM **Wealth Intelligently Navigated, LLC**	CRD NUMBER **8308023**
OFFICE ADDRESS **26 Parkway Commons Way, Greer, South Carolina 29650**	PHONE **(864) 301-4225**

Effective July 1, 2026

This brochure supplement provides information about Alex Spence that supplements the Wealth Intelligently Navigated, LLC brochure. You should have received a copy of that brochure. Please contact Alex Spence if you did not receive Wealth Intelligently Navigated, LLC's brochure, or if you have questions about this supplement. Mr. Spence's CRD number is 8308023.

Additional information about Alex Spence is also available on the SEC's website at **www.adviserinfo.sec.gov**.

ITEM 2

Educational Background and Business Experience

Alex Spence

Investment Adviser Representative

Year of Birth: 1994

BUSINESS BACKGROUND

Wealth Intelligently Navigated, LLC Investment Adviser Representative	July 2026 – Present
BMW Manufacturing Co., LLC Supplier Quality Engineer	February 2020 – Present
Bertrandt US Inc. Product and Quality Engineer	July 2016 – June 2020

EDUCATIONAL BACKGROUND

North Carolina State University Bachelor of Science in Mechanical Engineering	2017

ITEM 3

Disciplinary Information

Mr. Spence does not have any reportable disciplinary disclosures.

ITEM 4

Other Business Activities

Mr. Spence is employed full-time by BMW Manufacturing Co., LLC as a Supplier Quality Engineer, a position that is not investment-related. He works approximately 40 hours per week in this role, which involves industrializing suppliers for new product launches and performing annual re-qualifications.

This activity does not present a compensation-based conflict of interest with Mr. Spence's advisory clients, as his role at BMW Manufacturing Co., LLC is unrelated to the securities or investment advisory business and is not compensated based on the sale of any investment or insurance product.

ITEM 5

Additional Compensation

Alex Spence does not receive any economic benefit from anyone who is not a client for providing advisory services.

ITEM 6

Supervision

Wealth Intelligently Navigated, LLC has written supervisory procedures in place that are reasonably designed to detect and prevent violations of the securities laws, rules, and regulations of the US Investment Advisers Act of 1940, as amended (the “Advisers Act”). Mr. Spence is supervised by Wealth Intelligently Navigated, LLC’s Chief Compliance Officer Anna Wolford. Ms. Wolford can be reached at (864) 375-4031.

FORM ADV PART 2B
BROCHURE SUPPLEMENT

Joshua Gallman

INVESTMENT ADVISER REPRESENTATIVE

FIRM **Wealth Intelligently Navigated, LLC**	CRD NUMBER **8315523**
OFFICE ADDRESS **150 E Henry St, Building 2, Floor 3, Spartanburg, SC 29306**	PHONE **(864) 375-4031**

Effective October 14, 2026

This brochure supplement provides information about Joshua Gallman that supplements the Wealth Intelligently Navigated, LLC brochure. You should have received a copy of that brochure. Please contact Joshua Gallman if you did not receive Wealth Intelligently Navigated, LLC's brochure, or if you have questions about this supplement. Mr. Gallman's CRD number is 8315523.

Additional information about Joshua Gallman is also available on the SEC's website at **www.adviserinfo.sec.gov**.

ITEM 2

Educational Background and Business Experience

Joshua Gallman

Investment Adviser Representative

Year of Birth: 1988

BUSINESS BACKGROUND

Wealth Intelligently Navigated, LLC Investment Adviser Representative	July 2026 – Present
Wealth Intelligently Navigated, LLC Assistant	October 2025 – July 2026
Unclaimed Furniture Manager of Sales	March 2018 – October 2025
Self-Employed Professional Golfer	June 2010 – March 2018

EDUCATIONAL BACKGROUND

University of South Carolina Upstate Bachelor's Degree in Business Marketing	2010

ITEM 3

Disciplinary Information

Mr. Gallman does not have any reportable disciplinary disclosures.

ITEM 4

Other Business Activities

Mr. Gallman is not engaged in any other business activity that requires disclosure under this Item.

ITEM 5

Additional Compensation

Joshua Gallman does not receive any economic benefit from anyone who is not a client for providing advisory services.

ITEM 6

Supervision

Wealth Intelligently Navigated, LLC has written supervisory procedures in place that are reasonably designed to detect and prevent violations of the securities laws, rules, and regulations of the South Carolina Securities Act. Mr. Gallman's advisory activities are supervised by Anna Wolford, the Firm's Chief Compliance Officer, who is responsible for reviewing and supervising the securities-related activities of the Firm's Investment Adviser Representatives, including Mr. Gallman. Anna Wolford can be reached at (864) 375-4031.