

## Item 1 Cover Page

A.

**Jonathan Scott Solo**

Live Oak Wealth Advisory Group, LLC

Brochure Supplement

Dated: March 24, 2026

Contact: Jonathan Solo, Chief Compliance  
Officer 2245 Texas Drive, Suite 300

Sugar Land, Texas 77479

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

B.

**This brochure supplement provides information about Jonathan Scott Solo that supplements the Live Oak Wealth Advisory Group, LLC brochure; you should have received a copy of that brochure. Please contact Jonathan Solo, Chief Compliance Officer, if you did *not* receive Live Oak Wealth Advisory Group, LLC's brochure or if you have any questions about the contents of this supplement.**

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

## Item 2 Education Background and Business Experience

Jonathan Scott Solo was born in 1971. Mr. Solo graduated from The University of North Carolina at Charlotte, with a Bachelor of Science degree in Computer Science. Mr. Solo has been employed as an investment adviser representative of Live Oak Wealth Advisory Group, LLC since October of 2010. Since January of 2022, Mr. Solo has also been the Managing Member of QuantStrat Capital Group, LLC. From November of 2017 to July of 2022, Mr. Solo was an investment adviser representative of WhiteTip Capital, LLC.

## Item 3 Disciplinary Information

Mr. Solo has no reportable disciplinary history.

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

- A. Mr. Solo is not actively engaged in any other investment-related businesses or occupations.
- B. Mr. Solo is not actively engaged in any non-investment-related business or occupation for compensation.

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

Mr. Solo does not receive any additional compensation.

#### **Item 6 Supervision**

The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4)-7 policies and procedures is to comply with the supervision requirements of Section 203(e)(6) of the Investment Advisers Act of 1940 (the "Act"). The Registrant's Chief Compliance Officer, Jonathan Solo, is primarily responsible for the implementation of the Registrant's policies and procedures and overseeing the activities of the Registrant's supervised persons. Should an employee, independent contractor, investment adviser representative, or promoter of the Registrant have any questions regarding the applicability/relevance of the Act, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Mr. Solo at (281) 822-9200.

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### **William Kenneth Jobes, Sr.**

Live Oak Wealth Advisory Group, LLC

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Contact: Jonathan Solo, Chief Compliance  
Officer 2245 Texas Drive, Suite 300  
Sugar Land, Texas 77479  
[www.liveoakwag.com](http://www.liveoakwag.com)

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

## **Item 2 Education Background and Business Experience**

William Kenneth Jobes was born in 1942. Mr. Jobes graduated from Texas Tech, with a Bachelor of Arts degree in Political Science and Economics. Mr. Jobes has been employed as an investment adviser representative of Live Oak Wealth Advisory Group, LLC since October of 2010. From March 2008 to September of 2010, Mr. Jobes was employed as a Financial Consultant of RBC Capital Markets Corporation.

## **Item 3 Disciplinary Information**

Mr. Jobes has no reportable disciplinary history.

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

- A. Mr. Jobs is not actively engaged in any other investment-related businesses or occupations.
- B. Mr. Jobs is not actively engaged in any non-investment-related business or occupation for compensation.

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

Mr. Jobs does not receive any additional compensation.

#### **Item 6 Supervision**

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A.

### **John Robert Whittington**

Live Oak Wealth Advisory Group, LLC

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Dated: March 24, 2026

Contact: Jonathan Solo, Chief Compliance  
Officer 2245 Texas Drive, Suite 300  
Sugar Land, Texas 77479  
[www.liveoakwag.com](http://www.liveoakwag.com)

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

## **Item 2 Education Background and Business Experience**

John Robert Whittington was born in 1952. Mr. Whittington graduated from Texas State University, with a Bachelor of Science degree in Political Science and Geography. Mr. Whittington has been employed as an investment adviser representative of Live Oak Wealth Advisory Group, LLC since June of 2021. From December 2009 to June of 2021, Mr. Whittington was employed as a Financial Advisor with Bank of America.

## **Item 3 Disciplinary Information**

Mr. Whittington has no reportable disciplinary history.

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

- A. Mr. Whittington is not actively engaged in any other investment-related businesses or occupations.
- B. Mr. Whittington is not actively engaged in any non-investment-related business or occupation for compensation.

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

Mr. Whittington does not receive any additional compensation.

#### **Item 6 Supervision**

The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4)-7 policies and procedures is to comply with the supervision requirements of Section 203(e)(6) of the Investment Advisers Act of 1940 (the "Act"). The Registrant's Chief Compliance Officer, Jonathan Solo, is primarily responsible for the implementation of the Registrant's policies and procedures and overseeing the activities of the Registrant's supervised persons. Should an employee, independent contractor, investment adviser representative, or promoter of the Registrant have any questions regarding the applicability/relevance of the Act, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Mr. Solo at (281) 822-9200.