

Item 1 Cover Page

A.

Jonathan Scott Solo

Live Oak Wealth Advisory Group, LLC

Brochure Supplement

Dated: March 13, 2025

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

Sugar Land, Texas 77479

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.

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 been the Managing Member of QuantStrat Capital Group, LLC and the General Partner and from April 2022 to December of 2023. Mr. Solo was the Sponsor of QuantStrat Digital Asset High Yield Fund, LP. From November of 2017 to July of 2022, Mr. Solo was also an investment adviser representative of WhiteTip Capital, LLC. From November of 2017 to May of 2019, Mr. Solo was the Managing Member of QuantStrat Capital, LLC and the General Partner and Sponsor of QuantStrat Global Equity Fund, LP. From March of 2008 to September of 2010, Mr. Solo was employed as a Financial Consultant of RBC Capital Markets Corporation, LLC. From October of 2007 through March of 2008, Mr. Solo was a Financial Consultant at RBC Dain Rauscher.

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

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Additional information about William Kenneth Jobes is available on the SEC's website at 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. Prior to that, from January 1998 through March 2008, Mr. Jobes was a Representative at Dain Rauscher Incorporated.

Item 3 Disciplinary Information

Mr. Jobes has no reportable disciplinary history.

Item 4 Other Business Activities

- A. Mr. Jobes is not actively engaged in any other investment-related businesses or occupations.
- B. **Licensed Insurance Agent.** Mr. Jobes, in his individual capacity, is a licensed insurance agent, and may recommend the purchase of certain insurance-related products on a commission basis. Clients can engage Mr. Jobes to purchase insurance products on a commission basis. **Conflict of Interest:** The recommendation by Mr. Jobes that a client purchase an insurance commission product presents a conflict of interest, as the receipt of commissions may provide an incentive to recommend investment products based on commissions to be received, rather than on a particular client's need. No client is under any obligation to purchase any insurance commission products from Mr. Jobes. Clients are reminded that they may purchase insurance products recommended by LOWAG through other, non-affiliated insurance agents. **The Registrant's Chief Compliance Officer, Jonathan Solo, remains available to address any questions that a client or prospective client may have regarding the above conflict of interest.**

Item 5 Additional Compensation

Mr. Jobes does not receive any additional compensation.

Item 6 Supervision

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John Robert Whittington

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This brochure supplement provides information about John Robert Whittington 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 John Robert Whittington is available on the SEC's website at 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.