

**Item 1 – Cover Page****BRADLY K. WILFONG**

BETO FINANCIAL GROUP, LLC

*DOING BUSINESS AS***BR WEALTH MANAGEMENT**

380 East Parkcenter Boulevard  
Suite 205  
Boise, Idaho 83706  
Phone: (208) 258-2540  
Website: [www.brwealthmgmt.com](http://www.brwealthmgmt.com)

March 13, 2023

This Form ADV Part 2B (“brochure supplement”) provides information about Bradley K. Wilfong that supplements Beto Financial Group, LLC, *d/b/a* BR Wealth Management’s (“BRWM”) Form ADV Part 2A firm brochure (“firm brochure”). You should have received a copy of the firm brochure. Please contact BRWM at (208) 258-2540 if you did not receive a copy of the firm brochure or if you have any questions about the contents of this brochure supplement.

Additional information about Bradley K. Wilfong is available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov). The searchable IARD/CRD number for Bradley K. Wilfong is 5842194.

**Item 2 – Educational Background and Business Experience****Name of Investment Advisor Representative and Year of Birth:**

Bradly K. Wilfong (born 1983)

**Education:**

University of Idaho, Bachelor of Science

**Employment:**

Investment Advisor Representative, Beto Financial Group, LLC, 07/2020– Present

Registered Representative, Wells Fargo Advisors Financial Network LLC, 09/2013 – 06/2020

Investment Advisor Representative, Wells Fargo Advisors Financial Network LLC, 03/2014 – 06/2020

Investment Advisor Representative, U.S. Bancorp Investments, Inc., 01/2011 – 05/2013

Registered Representative, U.S. Bancorp Investments, Inc., 01/2011 – 05/2013

Associate, U.S. Bancorp Investments, Inc., 09/2010 – 01/2011

Relationship Manager, U.S. Bank, 12/2007 – 08/2010

**Exams and Designations:**

A listing of industry examinations successfully completed by Mr. Wilfong can be accessed at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) and <https://brokercheck.finra.org/>.

**Item 3 – Disciplinary Information**

Mr. Wilfong is required to disclose all material facts regarding any legal or disciplinary event that would be material to your evaluation of BRWM and his qualifications to serve as an investment advisor representative of the firm. Mr. Wilfong has no information to disclose under this item.

**Item 4 – Other Business Activities**

In addition to his role as an investment advisor representative of BRWM, Mr. Wilfong is also individually licensed as an insurance agent and may receive commissions on the sale of insurance products or services to clients and in certain instances, payments for the renewal of certain insurance products, in addition to advisory fees for advisory services. These payments vary by insurance product and company and may provide different incentives depending on the amount of the renewal payment.

The receipt of insurance related commissions or fees by any individual associated with our firm presents a conflict of interest. As a fiduciary, Mr. Wilfong must act primarily for the benefit of our investment advisory clients. As such, Mr. Wilfong will only transact insurance related business with clients when fully disclosed, suitable, and appropriate. Further, we must determine in good faith that any commissions or fees paid to our associated persons are appropriate. Clients are informed that they are under no obligation to use any individual associated with our firm for the purchase of any insurance products or services. Clients may use

any insurance firm or insurance agent they choose for purchase of these products and services. We encourage you to ask us about the conflicts of interest presented by the broker-dealer and insurance licensing of our associated persons.

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

Except as described in Item 4, Mr. Wilfong does not receive any additional compensation (or economic benefit) for providing investment advisory services to clients.

#### **Item 6 – Supervision**

Mr. Wilfong's activities are supervised by Brian E. Randolph, BRWM's Chief Compliance Officer. Mr. Randolph may be contacted by phone at the telephone number found on the cover page of this brochure supplement. Mr. Randolph, and other individuals as he may designate, regularly review client accounts to monitor for suitability of recommendations and compliance with BRWM's internal procedures, code of ethics, and applicable regulatory requirements. Mr. Randolph can be reached at (208) 258-2540.