

Enduring Wealth Management, LLC

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Form ADV Part 2B
Firm Brochure
Supplement
June 27, 2025

This Brochure Supplement provides information for Ben Rice that supplements the Enduring Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact us at 208-409-0147 or ben.rice@enduringwealthmanagement.com if you did not receive Enduring Wealth Management, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Ben Rice is also available on the SEC's website at www.adviserinfo.sec.gov.

ITEM 2

Educational Background and Business Experience

Ben Rice, born in 1970, graduated from Chapman University in May 1993 with a Bachelor of Business Administration. Ben Rice's employment information is listed below.

Enduring Wealth Management, LLC
Founder and CCO

May 2025 – Present

Raymond James & Associates Inc.
Registered Associate

January 2018 – Present

PROFESSIONAL DESIGNATIONS

Certified Financial Planner™, CFP®

The CERTIFIED FINANCIAL PLANNER™, CFP®, and federally registered CFP (with flame design) marks (collectively, the "CFP® marks") are professional certification marks granted in the United States by the Certified Financial Planner Board of Standards, Inc. ("CFP Board").

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 71,000 individuals have obtained CFP® certification in the United States.

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

- Education – Complete an advanced college-level course of study addressing the financial planning subject areas that the CFP Board's studies have determined as necessary for the competent and professional delivery of financial planning services and attain a bachelor's degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP Board's financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;
- Examination – Pass the comprehensive CFP® Certification Examination. The examination includes case studies and client scenarios designed to test one's ability to correctly diagnose financial planning issues and apply one's knowledge of financial planning to real-world circumstances;
- Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year) and
- Ethics – Agree to be bound by the CFP Board's *Standards of Professional Conduct*, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- Continuing Education – Complete 30 hours of continuing education hours every two years, including two hours on the *Code of Ethics* and other parts of the *Standards of Professional Conduct*, to maintain competence and keep up with developments in the financial planning field and
- Ethics – Renew an agreement to be bound by the *Standards of Professional Conduct*. The *Standards* prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to the CFP Board's enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

ITEM 3

Disciplinary Information

Ben Rice has not been and/or is presently not involved in any disciplinary, legal, or regulatory events that would be material to a client's evaluation of him or of EWM.

ITEM 4

Other Business Activities

Ben Rice is also an insurance agent licensed to sell insurance products. A conflict of interest exists because these services can pay a commission, which conflicts with the IAR's fiduciary duties. EWM does not require its IARs to encourage clients to implement investment advice through our insurance product recommendations. Clients have the right to implement insurance product recommendations through the insurance agency and agent of their choice. We require that all IARs disclose this conflict of interest when such recommendations are made. We also require IARs to disclose that the client has the right to purchase recommended products from individuals not affiliated with EWM.

ITEM 5

Additional Compensation

Ben Rice does not receive any additional compensation.

ITEM 6

Supervision

Ben Rice, President and Chief Compliance Officer of EWM, is responsible for supervising the investment advisory activities of the investment adviser representatives. Ben Rice monitors and reviews all forms of written communications that the investment adviser representatives provide to clients. Ben Rice can be contacted via telephone at 208-409-0147 and via email at ben.rice@enduringwealthmanagement.com.

ITEM 7

Requirements for State-Registered Advisers

A. Ben Rice has not been involved in an award or found liable in any arbitration claim or in any civil, self-regulatory organization or administrative proceedings.

B. Ben Rice has not been the subject of a bankruptcy petition.