

FORM ADV PART 2B BROCHURE SUPPLEMENT

UPDATED: June 3, 2025

DEDICATED TO ENHANCING THE CLIENT EXPERIENCE

Max Isaacman

Fiscal Wisdom Wealth Management
61 Maple Avenue
Canton, CT 06019
Phone: (860) 673-1942

This Brochure Supplement provides information about Max Isaacman that supplements the Fiscal Wisdom Wealth Management ("FWWM") Brochure. You should have received a copy of that brochure. Please contact our Chief Compliance Officer, Daniel Roberts at (402)-9902768 if you did not receive FWWM's Brochure or if you have any questions about the contents of this Supplement. Additional information about Max Isaacman is available at the SEC's website at: www.adviserinfo.sec.gov.



FISCAL WISDOM
WEALTH MANAGEMENT

Background and Business Experience – Item 2

Max Isaacman

Born: 1939

Education:

Rider College, B.S., Business Administration, 1957 – 1961

William Penn High School, Harrisburg, Pennsylvania., 1953 - 1957

Business:

Max Isaacman has been a broker and investment advisor for 50 years.

Fiscal Wisdom Wealth Management (2013 – present) East/West Securities (1998 to 2013)

Registered Representative for stocks & bonds (1984 – 1997)

Registered Representative for institutional & individual investors with several brokerage firms, including Merrill Lynch, Montgomery Securities, Wedbush Morgan, Rodman & Renshaw, Cruttendon Roth, & McClurg Capital. The Bank of California Vice President, Personal Trust & Investments Division. Business development officer for the money-management services of the bank. Prospected for new clients by cross-selling within the bank marketed money management services within tax-advantaged structures such as charitable remainder trusts.

Wrote financial articles for media sources such as Personal Investing News, the San Francisco Examiner, Invest-ment Technology News and Delta Airlines Sky magazine.

LICENSES:

- Securities Representative, Series 7
- NYSE Branch Office Manager, Series 12
- Registered Options Principal, Series 4
- Uniform Securities Agent State Law, Series 63
- Uniform Investment Advisor Law, Series 65

Item 3 - Disciplinary Information

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of Max Isaacman and FWWM. Max Isaacman has a reportable occurrence under this item. The details of which can be found on FINRA's BrokerCheck link at www.finra.org/brokercheck or on the SEC's IAPD at www.adviserinfo.sec.gov.

Item 4 - Other Business Activities

Author/Writer – Max Isaacman writes Novels and Investment related Books and Articles Since September 2001. Healthcare Logistics.

Item 5 - Additional Compensation

Mr. Isaacman may receive additional compensation outside of Fiscal Wisdom Wealth Management. Max Isaacman does not receive economic benefit, including sales awards, other prizes, and any bonus that is based, at least in part, on the number or amount of sales, client referrals, or new accounts, for providing advisory services. He does not receive any performance-based fees.

Item 6 - Supervision

FWWM has adopted a Compliance Manual that outlines for each employee the rules and regulations to which they must adhere. Additionally, FWWM has adopted a Code of Ethics that requires each employee to always act in the best interest of clients. FWWM has appointed a Chief Compliance Officer to review and monitor Max Isaacman's activity with respect to these rules and regulations. Should you have questions related to these activities, please contact Daniel Roberts, CCO at (402) 990-2768.