

FORM ADV PART 2B BROCHURE SUPPLEMENT

UPDATED: June 3, 2025

DEDICATED TO ENHANCING THE CLIENT EXPERIENCE

Renee Amochaev
Investment Advisor Representative
CRD#3253371
Fiscal Wisdom Wealth Management
D.B.A. - R.A. Wealth Management, Inc.
Mail: 2777 Yulupa Ave. PMB #262
Santa Rosa, CA 95405
Phone: 707-292-2018

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

This Brochure Supplement provides information about Renee Amochaev that supplements the Fiscal Wisdom Wealth Management ("FWWM") Brochure. You are entitled to receive a copy of that Brochure. Please contact our Chief Compliance Officer, Daniel Roberts at (402)-990-2768 if you did not receive FWWM's Brochure or if you have any questions about the contents of this Supplement. Additional information about Renee Amochaev is available at the SEC's website at: www.adviserinfo.sec.gov.



FISCAL WISDOM
WEALTH MANAGEMENT



Background and Business Experience – Item 2

Renee-Eva Fassbender Amochaev

Born: 1969

Education:

B.A. from the University of California, Davis.

Business:

August 2020 – Present: Fiscal Wisdom Wealth Management, LLC

September 2013 – December 2022: Portsmouth Financial Services, Inc.

May 2009 – September 2013: Wells Fargo Advisors LLC.

July 2004 – May 2009. Wachovia Securities LLC: March 2000 – July 2004. Salomon Smith Barney

July 1998 – March 2000: Merrill Lynch, Pierce, Fenner & Smith.

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 Renee Amochaev and FWWM. Your financial advisor has no legal or disciplinary events required to be disclosed in response to this item. There may be items that are contained on <https://brokercheck.finra.org> or www.adviserinfo.sec.gov that you may wish to review and consider in your evaluation of your advisor's and/or FWWM's background.

Item 4 - Other Business Activities

D.B.A. - R.A. Wealth Management, Inc.

Rental Property Owner

Arcata Income Properties, LLC

Item 5 - Additional Compensation

Renee Amochaev 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. She 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 Renee Amochaev'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.

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