

FORM ADV PART 2B BROCHURE SUPPLEMENT

UPDATED: June 3, 2025

DEDICATED TO ENHANCING THE CLIENT EXPERIENCE

Travis M. Tazawa

Investment Advisor Representative CRD Number: 5867568

116 Hualalai St., Suite 201A, Hilo, HI 96720

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(808) 638-4080

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

This Brochure Supplement provides information about Travis M. Tazawa 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)-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 Travis M. Tazawa is also available on the SEC's website at www.adviserinfo.sec.gov.



FISCAL WISDOM
WEALTH MANAGEMENT





Educational Background and Business Experience – Item 2

Name: Travis M. Tazawa

Year of Birth: 1987

Education:

Pacific University

07/1996 to 07/1999

BA in Business Administration with a Minor in Economics, 2009

01/1994 to 06/1996

Business:

Fiscal Wisdom Wealth Management, LLC - Investment Adviser Representative, 02/2022 - Present

AE Wealth Management, LLC - Investment Adviser Representative, 03/2018 - 02/2022

Milestone Wealth Management Wealth Manager, 08/2015 - Present

Milestone Coach Advisory Services, LLC Executive Director, 08/2015 - Present

Claraphi Advisory Network, LLC - Investment Adviser Representative, 08/2017 - 03/2018

Change Path, LLC - Investment Adviser Representative, 05/2017 - 08/2017

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 Travis Tazawa 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

Travis Tazawa is the Wealth Manager and licensed insurance agent of Milestone Wealth Management. Travis Tazawa offers life insurance and annuity products and may offer those products to persons that are also clients of FWWM. When he sells an insurance product, Travis Tazawa receives a commission. This presents a conflict of interest because it creates an incentive to recommend investment products based on the compensation received, rather than on the needs of clients. FWWM addresses this potential conflict with disclosures and supervisory procedures, which require all investment advisory recommendations to be in the best interest of our clients. Clients are under no obligation to purchase any product or service and may do so through another insurance agent of their choosing.

Travis Tazawa is also the Executive Director of Milestone Coach Advisory Services, LLC, the entity through which he conducts business planning and insurance activities.

Item 5 - Additional Compensation

Travis Tazawa 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 Travis Tazawa'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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