

This brochure supplement provides information about William M. Stewart that supplements the WMS Group LLC brochure. You should have received a copy of that brochure. Please contact William M. Stewart, Managing Member if you did not receive WMS Group LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about William M. Stewart is also available on the SEC's website at www.adviserinfo.sec.gov.

WMS Group LLC

Form ADV Part 2B – Individual Disclosure Brochure

for

William M. Stewart

Personal CRD Number: 2231632
Investment Adviser Representative

WMS Group LLC
14249 Thompson Road
Folsom, LA 70437
(985) 809-0530
(985) 377 6228
wmsgroup@advisormike.com

UPDATED: 03/04/2025

Item 2: Educational Background and Business Experience

Name: William M. Stewart **Born:** 1961

Education Background and Professional Designations:

Education:

William M Stewart has no formal education after high school.

Business Background:

05/2012 – Present Managing Member
WMS Group LLC

02/2008 – 07/2012 Registered Representative
BrokersXpress LLC

Item 3: Disciplinary Information

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

Item 4: Other Business Activities

William M. Stewart is not engaged in any investment-related business or occupation (other than this advisory firm).

William M. Stewart is the Vice President of Miracle Children's Foundation, a non-profit providing iPads to hospitalized children with cancer. He handles fundraising and event organization. He devotes 5 hours per month outside trading hours, with no financial compensation expected. For more information, contact Richard Newman or visit www.miraclechildrens.org.

Item 5: Additional Compensation

William M. Stewart is a licensed insurance agent. From time to time, he will offer clients advice or products from those activities. Clients should be aware that these services pay a commission and involve a conflict of interest, as commissionable products conflict with the fiduciary duties of a registered investment adviser. WMS Group LLC always acts in the best interest of the

client; including the sale of commissionable products to advisory clients. Clients are in no way required to implement the plan through any representative of WMS Group LLC in their capacity as a licensed insurance agent.

Item 6: Supervision

As the only owner and representative of WMS Group LLC, William M. Stewart supervises all duties and activities of the firm. William M. Stewart's contact information is on the cover page of this disclosure document. William M. Stewart adheres to all required regulations regarding the activities of an Investment Adviser Representative and follows all policies and procedures outlined in the firm's policies and procedures manual, including the Code of Ethics, and appropriate securities regulatory requirements.

Item 7: Requirements For State Registered Advisers

This disclosure is required by Louisiana securities authorities and is provided for your use in evaluating this investment advisor representative's suitability.

- A. William M. Stewart has **NOT** been involved in any of the events listed below.
1. An award or otherwise being found liable in an arbitration claim alleging damages in excess of \$2,500, involving any of the following:
 - a) an investment or an investment-related business or activity;
 - b) fraud, false statement(s), or omissions;
 - c) theft, embezzlement, or other wrongful taking of property;
 - d) bribery, forgery, counterfeiting, or extortion; or
 - e) dishonest, unfair, or unethical practices.
 2. An award or otherwise being found liable in a civil, self-regulatory organization, or administrative proceeding involving any of the following:
 - a) an investment or an investment-related business or activity;
 - b) fraud, false statement(s), or omissions;
 - c) theft, embezzlement, or other wrongful taking of property;
 - d) bribery, forgery, counterfeiting, or extortion; or
 - e) dishonest, unfair, or unethical practices.
- B. William M. Stewart has **NOT** been the subject of a bankruptcy petition at any time.