ADV Part 2B
Brochure Supplement
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Pioneer Wealth Management Group

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Milad Taghehchian, CPA, CFP®, PFS

Chris Cyndecki, CFA, CFP®

Ian Tennant, ChFC®

Daphne Jordan, CFP®

Nicole Renaux, CFP®, CCFC

Anthony Guzman, CFP®

April Busby, CPA, CFP®, PFS

Shirley Sanchez, MS, CFP®, CCFC

Angella Welcome, CFP®

Iza Picazo

This brochure supplement provides information about our advisors that supplements the Pioneer Wealth Management Group brochure. You should have received a copy of that brochure. Please contact us at (512) 334-6800 if you did not receive Pioneer Wealth Management Group's brochure or if you have any questions about the contents of this supplement.

Additional information about our advisors is available on the SEC's website at www.adviserinfo.sec.gov.

Designations held by Investment Advisor Representatives of Pioneer Wealth Management Group are as follows:

Certified Public Accountant (CPA)

CPAs are licensed and regulated by their state boards of accountancy. While state laws and regulations vary, the education, experience and testing requirements for licensure as a CPA generally include minimum college education (typically 150 credit hours with at least a baccalaureate degree and a concentration in accounting), minimum experience levels (most states require at least one year of experience providing services that involve the use of accounting, attest, compilation, management advisory, financial advisory, tax or consulting skills, all of which must be achieved under the supervision of or verification by a CPA), and successful passage of the Uniform CPA Examination. To maintain a CPA license, states generally require the completion of 40 hours of continuing professional education (CPE) each year (or 80 hours over a two-year period or 120 hours over a three-year period). Additionally, all American Institute of Certified Public Accountants (AICPA) members are required to follow a rigorous *Code of Professional Conduct* which requires that they act with integrity, objectivity, due care, competence, fully disclose any conflicts of interest (and obtain client consent if a conflict exists), maintain client confidentiality, disclose to the client any commission or referral fees, and serve the public interest when providing financial services.

Certified Financial Planner (CFP®)

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 several 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.

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

1. Education – Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board's studies have determined as necessary.
2. Examination – Pass the comprehensive CFP® Certification Examination, a 6-hour exam.
3. Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year).
4. Ethics – Agree to be bound by 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 to maintain the right to continue to use the CFP® marks:

1. Continuing Education – Complete 30 hours of continuing education hours every two years.
2. Ethics – Renew an agreement to be bound by the *Standards of Professional Conduct*.

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

Chartered Financial Analyst (CFA)

The Chartered Financial Analyst (CFA) charter is a professional designation established in 1962 and awarded by CFA Institute. To earn the CFA charter, candidates must pass three sequential, six-hour examinations over two to four years. The three levels of the CFA program test a wide range of investment topics, including ethical and professional standards, fixed-income analysis, alternative and derivative investments, and portfolio management and wealth planning. In addition, CFA charterholders must have at least four years of acceptable professional experience in the investment decision-making process and must commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct.

Chartered Financial Consultant® (ChFC®)

The Chartered Financial Consultant® (ChFC®) designation program focuses on the comprehensive financial planning process as an organized way to collect and analyze information on a client's total financial situation; to identify and establish specific financial goals; and to formulate, implement, and monitor a comprehensive plan to achieve those goals.

The ChFC® program provides financial planners and others in the financial services industry with in-depth knowledge of the skills needed to perform comprehensive financial planning for their clients.

To earn this designation, an eight-course examination must be passed. Designations are usually attained within 15-24 months. Three years of business experience immediately preceding the date of use of the designation is required. Each designee must also complete 30 hours of continuing education every two years.

Personal Financial Specialist (PFS)

The PFS credential demonstrates that an individual has met the minimum education, experience and testing required of a CPA in addition to a minimum level of expertise in personal financial planning. To attain the PFS credential, a candidate must hold an unrevoked CPA license, fulfill 3,000 hours of personal financial planning business experience, complete 80 hours of personal financial planning CPE credits, pass a comprehensive financial planning exam and be an active member of the AICPA. A PFS credential holder is required to adhere to AICPA's Code of Professional Conduct and is encouraged to follow AICPA's Statement on Responsibilities in Financial Planning Practice. To maintain their PFS credential, the recipient must complete 60 hours of financial planning CPE credits every three years. The PFS credential is administered through the AICPA.

Certified College Financial Consultant (CCFC)

Candidates must complete a comprehensive interactive self-paced online course and receive a passing score of at least 80% on all respective assessments (100 MC questions in total). The Education course covers the following modules:

- Education Funding
- Financial Aid Planning
- Planning with Education Tax Deductions and Credits
- Student Loan Advising
- Practical Planning Strategies

The final interview examination is conducted via video conference with a live recording function. The candidate is tested on their knowledge and ability to respond to seven questions including four client case studies that correspond to topics from any of the five lesson modules covered in the education course. Satisfactory responses to three out of the four client case studies will result in the candidate passing the exam.

CCFC designation holders must adhere to a Code of Ethics founded on the principles of integrity, objectivity, competence, fair treatment, privacy, professionalism, and diligence in order to maintain their certification and remain in good standing with the AICCFC.

CCFC designation holders who possess one of the approved prerequisite professional designations must complete 4 hours of relevant continuing education on an annual basis. All other CCFC designation holders must complete 15 hours of relevant continuing education on an annual basis.

Item 2 – Educational Background and Business Experience

Milad Taghehchian, CPA, CFP®, PFS, born 1981

Milad is a CFP® professional and has been an investment advisor since 2001. He volunteers for several organizations focused on education, financial literacy, and economic development. Milad is a firm believer in being a life-long learner and being eternally curious about all aspects of life. Milad has no outside business activities but does manage several LLCs as part of his family's investment portfolio.

Business Experience

Partner, Director of Wealth Management, Pioneer Wealth Management Group – 2005-Present
Wealth Advisor, American Express Financial Advisors – 2002-2004

Educational Background

The University of Texas at Austin – B.S. Economics
Certified Public Accountant (CPA)
CERTIFIED FINANCIAL PLANNER™ Professional
Personal Financial Specialist (PFS)

Item 3 – Disciplinary Information

There are no legal, civil, or disciplinary events to disclose regarding Milad Taghehchian. Milad has never been involved in any regulatory, civil, or criminal action. There have been no client complaints, lawsuits, arbitration claims, or administrative proceedings against Milad.

Item 4 – Other Business Activities

Registered investment advisers are required to disclose all material facts regarding business activities. Milad is a partner of Xylem Finance LLC, a tax preparation business.

Item 5 – Additional Compensation

Registered investment advisers are required to disclose all material facts regarding additional compensation for providing advisory services from someone who is not a client. Milad receives no additional compensation from non-clients for advisory services.

Item 6 – Supervision

Milad serves as Director of Wealth Management and Partner at Pioneer Wealth Management Group and is supervised by Nicole Renaux, Chief Compliance Officer. Nicole can be reached at (512) 334-6800.

Item 2 – Educational Background and Business Experience

Chris Cyndecki, CFA, CFP®, born 1990

After joining Pioneer Wealth Management Group in 2011, Chris earned both the Chartered Financial Analyst® (CFA®) designation and the CERTIFIED FINANCIAL PLANNER™ (CFP®) certification. As a Senior Wealth Advisor and Partner, he specializes in working with individuals and families navigating financial complexity related to employer equity compensation (including RSUs and stock options) and private investments. Chris is passionate about financial education and enjoys helping clients make confident, well-informed decisions across all areas of their financial lives.

Outside of work, Chris enjoys playing music (piano), skiing, and following Texas Longhorns athletics. He previously served as Treasurer for Austin Kids Can!, a nonprofit focused on providing access to after-school programs for underserved youth in the Austin area.

Business Experience

Partner, Senior Wealth Advisor, Pioneer Wealth Management Group – 2011-Present

Educational Background

The University of Texas at Austin – BBA, Finance
CERTIFIED FINANCIAL PLANNER™ Professional
Chartered Financial Analyst (CFA®) Charterholder
Investment Advisor Representative (Series 65)

Item 3 – Disciplinary Information

There are no legal, civil, or disciplinary events to disclose regarding Chris Cyndecki. Chris has never been involved in any regulatory, civil, or criminal action. There have been no client complaints, lawsuits, arbitration claims, or administrative proceedings against Chris.

Item 4 – Other Business Activities

Registered investment advisers are required to disclose all material facts regarding business activities. Chris is involved in Cyntennial Ventures LLC: Chris is a 50% owner in this entity, which was formed in 2018 to serve as an eventual investment vehicle for personal private equity investments. The entity's status is active, but with no current business activities.

Item 5 – Additional Compensation

Registered investment advisers are required to disclose all material facts regarding additional compensation for providing advisory services from someone who is not a client. Chris receives no additional compensation from non-clients for advisory services.

Item 6 – Supervision

Chris serves as a Senior Wealth Advisor at Pioneer Wealth Management Group and is supervised by Nicole Renaux, Chief Compliance Officer, and Milad Taghehchian, Director of Wealth Management. Nicole and Milad can be reached at (512) 334-6800.

Item 2 – Educational Background and Business Experience

Ian Tennant, ChFC®, born 1990

Ian's passion for financial planning arises out of a desire to help people truly identify the deeper purpose of their daily efforts in this world and remove undue stress from their lives. He holds the ChFC® advanced financial planning designation. He currently serves as a board member with Ghisallo Cycling Initiative, and previously served as a board member with Please BE KIND To Cyclists, both local cycling advocacy non-profit organizations in Austin, TX. He volunteers with Foundation Communities as a financial coach, credit counselor, and tax preparer for the underserved, and is a former Big mentor with Big Brothers Big Sisters. He's an audiophile and musician, loves to explore the city via bicycle, and spend time immersed in nature. He yearns for a world filled with more peace, curiosity, and community.

Business Experience

Partner, Senior Wealth Advisor, Pioneer Wealth Management Group – 2012-Present

Educational Background

The University of Texas at Austin – Engineering
Chartered Financial Consultant®
Investment Advisor Representative (Series 65)

Item 3 – Disciplinary Information

There are no legal, civil, or disciplinary events to disclose regarding Ian Tennant. Ian has never been involved in any regulatory, civil, or criminal action. There have been no client complaints, lawsuits, arbitration claims, or administrative proceedings against Ian.

Item 4 – Other Business Activities

Registered investment advisers are required to disclose all material facts regarding business activities. Ian serves as Treasurer for the Chamonix Owners Association. Ian is involved in Cyntennial Ventures LLC: Ian is a 50% owner in this entity, which was formed in 2018 to serve as an eventual investment vehicle for personal private equity investments. The entity's status is active, but with no current business activities.

Item 5 – Additional Compensation

Registered investment advisers are required to disclose all material facts regarding additional compensation for providing advisory services from someone who is not a client. Ian receives no additional compensation from non-clients for advisory services.

Item 6 – Supervision

Ian serves as a Senior Wealth Advisor at Pioneer Wealth Management Group and is supervised by Nicole Renaux, Chief Compliance Officer, and Milad Taghehchian, Director of Wealth Management. Nicole and Milad can be reached at (512) 334-6800.

Item 2 – Educational Background and Business Experience

Daphne Jordan, CFP®, born 1969

Daphne has a strong commitment to innovation and thought leadership as evident in her volunteer work in the financial industry.

She is a recent Board of Directors Chair for the National Association of Personal Financial Advisors. This is an association of over 4,000 Fee-Only, fiduciary advisors. Additionally, as the former president of the Austin Chapter of the Financial Planning Association, Daphne initiated establishment of a Women's Initiative to empower and grow the Chapter's female advisor segment.

Daphne's knowledge has earned her recognition as one of Investopedia's 100 Top Financial Advisors of 2021 and as a recipient of the prestigious 2019 InvestmentNews Excellence in Diversity Rising Star Award. As a sought-after expert, she has shared her insights on platforms such as the *NAPFA Nation*, *Fiduciary Voices*, *Money Savage* and *Negotiate Anything* podcasts and has been quoted in *The Wall Street Journal*, *The New York Times*, *CNBC*, *Kiplinger's* and *NerdWallet*.

With a varied background in teaching and non-profit management roles, Daphne brings a unique perspective to her work. As a firm believer in the power of relationships, she embodies the ethos of being relational and wholeheartedly invests in others. Her compassionate approach makes it an absolute joy for her to serve clients. As a former educator and life-long learner, she distinctly understands the transformational power of knowledge and the change it can enact.

Business Experience

Partner, Senior Wealth Advisor, Pioneer Wealth Management Group – 2017-Present
Wealth Planning Manager, Austin Asset – 2016-2017
Wealth Planning Senior Associate, Austin Asset – 2015-2016
Wealth Planning Associate, Austin Asset – 2013-2015
Business Manager, PromiseLand Church – 2002-2013
Teacher - Round Rock ISD – 1994 -2002

Educational Background

The University of Texas at Austin – Bachelors Mathematics
CERTIFIED FINANCIAL PLANNER™ Professional

Item 3 – Disciplinary Information

There are no legal, civil, or disciplinary events to disclose regarding Daphne Jordan. Daphne has never been involved in any regulatory, civil, or criminal action. There have been no client complaints, lawsuits, arbitration claims, or administrative proceedings against Daphne.

Item 4 – Other Business Activities

Registered investment advisers are required to disclose all material facts regarding business activities. Daphne volunteers as a director for the National Association of Personal Financial Advisors (NAPFA).

Item 5 – Additional Compensation

Registered investment advisers are required to disclose all material facts regarding additional compensation for providing advisory services from someone who is not a client. Daphne receives no additional compensation from non-clients for advisory services.

Item 6 – Supervision

Daphne serves as a Senior Wealth Advisor at Pioneer Wealth Management Group and is supervised by Nicole Renaux, Chief Compliance Officer, and Milad Taghehchian, Director of Wealth Management. Nicole and Milad can be reached at (512) 334-6800.

Item 2 – Educational Background and Business Experience

Nicole Renaux, CFP®, CCFC, born 1988

As a Partner and Senior Wealth Advisor at Pioneer Wealth Management Group, Nicole Renaux, CFP® provides impactful financial advice to help people address their tough questions and accomplish their financial goals. With each client, her goal is to create a customized financial plan that meets their unique needs and circumstances, so they can live their best lives. She is a CERTIFIED FINANCIAL PLANNER™ practitioner and a fiduciary.

Nicole works best with women breadwinners, wealth accumulators within 10 years of retirement, small business owners, and folks who experience a sudden windfall. Her services include comprehensive financial planning and investment management. Nicole's philosophy focuses on what you can control in your finances: tax efficiency, saving, and risk management.

Nicole currently serves on the Board of Directors of Camp Fire Central Texas, a non-profit that connects youth with nature through hands-on STEAM-based learning. In her free time, Nicole enjoys bicycling, hiking, Airstream adventures, and wrangling her chicken flock out of her East Austin garden. She is known for making pizza but not for excelling at the flute.

Business Experience

Partner, Senior Wealth Advisor, Chief Compliance Officer, Pioneer Wealth Management Group – 2019-Present
Wealth Advisor Associate, Morgan Stanley – 2017-2019
Business Administrator, Black Star Co-op – 2011-2017

Educational Background

The University of Texas at Austin – BBA, International Business
CERTIFIED FINANCIAL PLANNER ™ Professional

Item 3 – Disciplinary Information

There are no legal, civil, or disciplinary events to disclose regarding Nicole Renaux. Nicole has never been involved in any regulatory, civil, or criminal action. There have been no client complaints, lawsuits, arbitration claims, or administrative proceedings against Nicole.

Item 4 – Other Business Activities

Registered investment advisers are required to disclose all material facts regarding business activities. No information is applicable for Nicole.

Item 5 – Additional Compensation

Registered investment advisers are required to disclose all material facts regarding additional compensation for providing advisory services from someone who is not a client. Nicole receives no additional compensation from non-clients for advisory services.

Item 6 – Supervision

Nicole serves as a Senior Wealth Advisor and Chief Compliance Officer at Pioneer Wealth Management Group and is supervised by Milad Taghehchian, Director of Wealth Management. Milad can be reached at (512) 334-6800.

Item 2 – Educational Background and Business Experience

April Busby, CPA, CFP®, PFS, born 1970

April joined Pioneer Wealth in 2021 after an extensive career in public accounting, corporate finance, and non-profit/small business executive roles. She has been a licensed CPA since 1995 and specializes in helping clients understand their benefit packages, cash flows, investment portfolios and taxes. Previously, she was a 14-year volunteer for Boy Scouts of America, serving as Treasurer, Assistant Cubmaster and Den Leader positions and providing adult leadership during high-adventure treks, summer camps and scouts' advancement. In her free time, she enjoys hiking, camping, biking, fresh food, and coffee.

Business Experience

Wealth Advisor, Pioneer Wealth Management – 2021-Present
COO/CFO, Karisha Community Center for Wellness – 2020-2021
Long Center for the Performing Arts – 2016-2019
The University of Texas at Austin – 2005-2017

Educational Background

University of Southern California – Masters of Accounting (MAcc)
University of Alabama – BS, Business Administration | Accounting
Certified Public Accountant (CPA)
CERTIFIED FINANCIAL PLANNER™ Professional
Investment Advisor Representative (Series 65)
Personal Financial Specialist (PFS)

Item 3 – Disciplinary Information

There are no legal, civil, or disciplinary events to disclose regarding April Busby. April has never been involved in any regulatory, civil, or criminal action. There have been no client complaints, lawsuits, arbitration claims, or administrative proceedings against April.

Item 4 – Other Business Activities

Registered investment advisers are required to disclose all material facts regarding business activities. No information is applicable for April.

Item 5 – Additional Compensation

Registered investment advisers are required to disclose all material facts regarding additional compensation for providing advisory services from someone who is not a client. April receives no additional compensation from non-clients for advisory services.

Item 6 – Supervision

April serves as a Wealth Advisor at Pioneer Wealth Management Group and is supervised by Nicole Renaux, Chief Compliance Officer, and Milad Taghehchian, Director of Wealth Management. Nicole and Milad can be reached at (512) 334-6800.

Item 2 – Educational Background and Business Experience

Anthony Guzman, CFP®, born 1993

Anthony joined Pioneer Wealth in 2020 after serving as a paraplanner at a local investment advisory firm. Anthony served as a bilingual elementary teacher through Teach for America. Anthony is passionate for empowering families who are traditionally underserved by the financial services industry. He specializes in investment management, tax planning, and serving young families. Se Habla Español.

Business Experience

Wealth Advisor, Pioneer Wealth Management Group – 2020-Present
Paraplanner/Client Service Associate at Lucien, Stirling and Gray – 2019-2020
TeachforAmerica Corps Member and Bilingual Educator at Dallas ISD – 2017-2019

Educational Background

Texas A&M University – BBA, Accounting
CERTIFIED FINANCIAL PLANNER ™ Professional
Investment Advisor Representative (Series 65)

Item 3 – Disciplinary Information

There are no legal, civil, or disciplinary events to disclose regarding Anthony Guzman. Anthony has never been involved in any regulatory, civil, or criminal action. There have been no client complaints, lawsuits, arbitration claims, or administrative proceedings against Anthony.

Item 4 – Other Business Activities

Registered investment advisers are required to disclose all material facts regarding business activities. Anthony is a partner of Xylem Finance LLC, a tax preparation business.

Item 5 – Additional Compensation

Registered investment advisers are required to disclose all material facts regarding additional compensation for providing advisory services from someone who is not a client. Anthony receives no additional compensation from non-clients for advisory services.

Item 6 – Supervision

Anthony serves as a Wealth Advisor at Pioneer Wealth Management Group and is supervised by Nicole Renaux, Chief Compliance Officer, and Milad Taghehchian, Director of Wealth Management. Nicole and Milad can be reached at (512) 334-6800.

Item 2 – Educational Background and Business Experience

Shirley Sanchez, MS, CFP®, CCFC, born 1986

Shirley Sanchez joined Pioneer Wealth Management Group in 2021 after a career in counseling and education. She holds a master's degree in counseling and brings a thoughtful, grounded approach to financial planning—helping clients gain clarity and direction while addressing the emotional side of financial decision-making.

Financial planning became a natural extension of Shirley's work with others, blending her long-standing interest in personal finance with her desire to help individuals and families make informed, confident choices. She enjoys digging into financial details, understanding the story behind the numbers, and translating that insight into clear, actionable strategies that make a meaningful difference over time.

Previously, she volunteered for Foundation Communities as a financial coach, where she helped underserved communities reach their financial goals. In her free time, you can find her spending time with her two children and husband, drinking coffee, and enjoying new experiences around town and elsewhere.

Business Experience

Wealth Advisor, Pioneer Wealth Management – 2021-present
Assistant Director of Undergraduate Services, UT Austin – 2015-2021
Associate Advisor, UT Austin – 2012-2015

Educational Background

California State University, Long Beach – MS Counseling
University of California Santa Barbara – BA Sociology | Applied Psychology | Education
CERTIFIED FINANCIAL PLANNER ™ Professional

Item 3 – Disciplinary Information

There are no legal, civil, or disciplinary events to disclose regarding Shirley Sanchez. Shirley has never been involved in any regulatory, civil, or criminal action. There have been no client complaints, lawsuits, arbitration claims, or administrative proceedings against Shirley.

Item 4 – Other Business Activities

Registered investment advisers are required to disclose all material facts regarding business activities. No information is applicable for Shirley.

Item 5 – Additional Compensation

Registered investment advisers are required to disclose all material facts regarding additional compensation for providing advisory services from someone who is not a client. Shirley receives no additional compensation from non-clients for advisory services.

Item 6 – Supervision

Shirley serves as a Wealth Advisor at Pioneer Wealth Management Group and is supervised by Nicole Renaux, Chief Compliance Officer, and Milad Taghehchian, Director of Wealth Management. Nicole and Milad can be reached at (512) 334-6800.

Item 2 – Educational Background and Business Experience

Angella Welcome, CFP®, born 1983

Angella joined Pioneer Wealth in 2024 after holding relationship management and marketing roles in the investment management industry. Her passion for financial planning developed while she was training as a classical pianist, where she met many talented colleagues who would have benefitted from having a financial advisor to help them plan around uneven cash flows and save for retirement. Previously, she worked for Dimensional Fund Advisors, a global investment manager, where she learned about the downsides of stock picking and the merits of trusting the markets. In her free time, she enjoys playing the piano, speaking French, and hiking across the Southwestern US with her husband and toddler.

Business Experience

Wealth Advisor, Pioneer Wealth Management Group – 2024-Present
Head of Marketing for Kestra Investment Management, Kestra Holdings – 2022-2023
Channel Marketing Manager, Dimensional Fund Advisors – 2020-2022
Senior Associate Channel Marketing, Dimensional Fund Advisors – 2019-2020
Senior Associate Global Client Group, Dimensional Fund Advisors – 2018-2019
Graduate Business Intern, Dimensional Fund Advisors – 2017
Graduate Intern, Thornburg Investment Management – 2016
Client Service Associate, RBC Wealth Management – 2015

Educational Background

University of Nevada, Las Vegas – Bachelor of Arts, French Studies
University of New Mexico – Master of Business Administration
Investment Advisor Representative (Series 66)
CERTIFIED FINANCIAL PLANNER ™ Professional

Item 3 – Disciplinary Information

There are no legal, civil, or disciplinary events to disclose regarding Angella. Angella has never been involved in any regulatory, civil, or criminal action. There have been no client complaints, lawsuits, arbitration claims, or administrative proceedings against Angella.

Item 4 – Other Business Activities

Registered investment advisers are required to disclose all material facts regarding business activities. No information is applicable for Angella.

Item 5 – Additional Compensation

Registered investment advisers are required to disclose all material facts regarding additional compensation for providing advisory services from someone who is not a client. Angella receives no additional compensation from non-clients for advisory services.

Item 6 – Supervision

Angella serves as a Wealth Advisor at Pioneer Wealth Management Group and is supervised by Nicole Renaux, Chief Compliance Officer, and Milad Taghehchian, Director of Wealth Management. Nicole and Milad can be reached at (512) 334-6800.

Item 2 – Educational Background and Business Experience

Iza Picazo, born 2001

Business Experience

Client Service Associate, Pioneer Wealth Management Group – 2024-Present
Teacher, Austin Independent School District – 2023-2024
Student, University of Texas at Austin – 2019-2023

Educational Background

University of Texas at Austin – BSA Math
Investment Advisor Representative (Series 65)

Item 3 – Disciplinary Information

There are no legal, civil, or disciplinary events to disclose regarding Iza. Iza has never been involved in any regulatory, civil, or criminal action. There have been no client complaints, lawsuits, arbitration claims, or administrative proceedings against Iza.

Item 4 – Other Business Activities

Registered investment advisers are required to disclose all material facts regarding business activities. No information is applicable for Iza.

Item 5 – Additional Compensation

Registered investment advisers are required to disclose all material facts regarding additional compensation for providing advisory services from someone who is not a client. Iza receives no additional compensation from non-clients for advisory services.

Item 6 – Supervision

Iza serves as a Client Service Associate at Pioneer Wealth Management Group and is supervised by Nicole Renaux, Chief Compliance Officer, and Milad Taghehchian, Director of Wealth Management. Nicole and Milad can be reached at (512) 334-6800.