WILLIAMSON LEGACY GROUP, LLC

Brochure Supplement

(Part 2B of Form ADV)

Dated March 11, 2025

176 West Logan Street
#222
Noblesville, Indiana 46060
Telephone: 317-447-3212
www.williamsonlegacygroup.com

This brochure supplement provides information about the following Supervised Persons:

Joseph Williamson
Donald Phelan
Jeanette McCormick
Benjamin Hecht
Owen Williamson

that supplements the Williamson Legacy Group Brochure (Part 2A of Form ADV). You should have received a copy of Williamson Legacy Group's Brochure (Part 2A of Form ADV). Please contact Andy Warning, Chief Compliance Officer at 513-832-5463 or by email at andy.warning@dinsmorecomplianceservices.com if you did not receive Williamson Legacy Group's Brochure or if you have any questions about the contents of this supplement.

Additional information about the above listed persons is available on the SEC's website at https://adviserinfo.sec.gov.

Education and Business Standards

Williamson Legacy Group requires that any employee whose function involves determining or giving investment advice to clients must be a graduate of a four year college or otherwise have financial services experience to a degree as determined by Williamson Legacy Group. In addition, all such Williamson Legacy Group employees must hold the appropriate investment adviser representative testing/license qualification so as to ensure such employees are properly licensed for all advisory activities in which they are engaged.

Supervision

All Supervised Persons (i.e. Williamson Legacy Group's professional team) listed on the front page of this Brochure Supplement provide advice to clients. Joseph Williamson is the President of Williamson Legacy Group and in that capacity manages and supervise all activities of the firm. All Supervised Person's compliance-related activities are monitored by Williamson Legacy Group's Chief Compliance Officer, Andy Warning. Andy Warning's compliance-related activities are monitored by Joseph Williamson. Andy Warning can be reached at 513-832-5463 and Joseph Williamson can be reached at 317-447-3212.

Additional Compensation

Donald Phelan is paid a percentage of the revenue earned by Williamson Legacy Group on the clients he has introduced to the firm. The remaining financial professionals, other than Joseph Williamson, are paid a percentage of the net revenue of the firm. Joseph Williamson is paid through his ownership of the firm.

Professional Certifications

Williamson Legacy Group's financial professionals have earned certifications and credentials that are required to be explained in further detail:

Chartered Financial Consultant (ChFC®)

The Chartered Financial Consultant ("ChFC®") is a financial planning designation for the insurance industry conferred by The American College. Candidates must meet education, experience, examination, and continuing ethical requirements. Candidates must have at least three years of experience in the financial industry, or an undergraduate or graduate degree from an accredited university and two years of experience in the financial industry. Candidates are required to take nine academic courses each followed by an exam. The courses and exams cover topics in finance, investing, insurance, and estate planning. The ChFC® requires 30 hours of continuing education every two years. Holders of the ChFC® designation must adhere to The American College's Code of Ethics.

Chartered Life Underwriter (CLU®)

The Chartered Life Underwriter ("CLU®") is a designation of insurance expertise conferred by the American College. Candidates must meet education, experience, examination, and continuing ethical requirements. Candidates must have at least three years of full-time business experience in the financial industry and are required to take 8 academic courses each followed by an exam. The CLU® requires 30 hours of continuing education every two years. Holders of the CLU® designation must adhere to The American College's Code of Ethics.

Accredited Asset Management Specialist (AAMS®)

The Accredited Asset Management Specialist ("AAMS®"), designation is conferred by the College of Financial Planning. Individuals who hold the AAMS® designation have completed a course of study encompassing investments, insurance, tax, retirement, and estate planning issues. Additionally, individuals must pass an end-of-course examination that tests their ability to synthesize complex concepts and apply theoretical concepts to real-life situations. All designees have agreed to adhere to Standards of Professional Conduct and are subject to a disciplinary process. Designees renew their designation every two-years by completing 16 hours of continuing education, reaffirming adherence to the Standards of Professional Conduct and complying with self-disclosure requirements

Accredited Domestic Partnership Advisor (ADPA®)

The Accredited Domestic Partnership Advisor, ("ADPA®"), designation is conferred by the College of Financial Planning. Individuals who hold the ADPA® designation have completed a course of study encompassing wealth transfers, federal taxation, retirement planning, and planning for financial and medical end-of-life needs for domestic partners. Additionally, individuals must pass an end-of-course examination that tests their ability to synthesize complex concepts and apply theoretical concepts to real-life situations. All designees have agreed to adhere to Standards of Professional Conduct and are subject to a disciplinary process. Designees renew their designation every two-years by completing 16 hours of continuing education, reaffirming adherence to the Standards of Professional Conduct and complying with self-disclosure requirements.

Retirement Income Certified Professional (RICP®)

The Retirement Income Certified Profession, ("RICP®"), designation is conferred by the American College. Individuals who hold the RICP® designation have completed a course of study encompassing building integrated and comprehensive retirement income plans. Additionally, three years of professional experience are required along with three required courses, equivalent of nine semester credit hours. Individuals must pass a final, closed book, proctored exam for each course. Designees renew their designation every two-years by completing 15 hours of continuing education, reaffirming adherence to the Standards of Professional Conduct and complying with self-disclosure requirements.

Joseph Richard Williamson, Managing Director and CEO

Year of Birth: 1948

Education Background:

- Ball State University, Muncie, Indiana, Bachelor of Science (1966-1970)

Business Background:

- Williamson Legacy Group, Managing Director and CEO (03/2022 – Present)
- Axxcess Wealth Management, LLC, Advisor (08/2021 - 02/2022)
- Wells Fargo Clearing Services, LLC, Advisor and Registered Representative (07/2003 – 08/2021)
- Prudential Securities, Advisor and Registered Representative (03/1984 - 07/2003)

Mailing address and contact number:
484 East Carmel Drive, #388
Carmel, Indiana 46032
317-447-3212

Disciplinary Information: None

Other Business and Professional Activities:

- Mr. Williamson currently holds the Chartered Financial Consultant and Chartered Life Underwriter designations. See pages 2 and 3 for additional information regarding these designations.

Additional Compensation: None

Supervision: See page 2

Donald Matthew Phelan, Investment Adviser Representative

Year of Birth: 1957

Education Background:

- DePauw University, Greencastle, Indiana, Bachelor of Arts (1975-1979)
- University of Indianapolis, Indianapolis, Indiana, Masters of Business Administration – degree not completed (1981 – 1983)

Business Background:

- Williamson Legacy Group, Investment Advisor Representative (03/2022 – Present)
- Axxcess Wealth Management, LLC, Investment Advisor Representative (08/2021 – 02/2022)
- Wells Fargo Clearing Services, LLC, Advisor and Registered Representative (01/2005 – 08/2021)

Mailing address and contact number:
484 East Carmel Drive, #388
Carmel, Indiana 46032
317-447-3212

Disciplinary Information: None

Other Business and Professional Activities:

- Mr. Phelan currently holds the Accredited Asset Management Specialist and Accredited Domestic Partnership Advisor designations. See page 3 for additional information regarding these designations.

Additional Compensation: See page 2. In addition, Mr. Phelan is a licensed insurance agent. In such capacity Mr. Phelan may offer insurance products and receive a normal and customary commission as a result of such purchase. To the extent that Mr. Phelan recommends the purchase of insurance products where he may receive commissions for doing so, a conflict of interest exists because Mr. Phelan receives remuneration should a client elect to follow his recommendations, even if such recommendation is based on the best interest of clients and their needs. To address this conflict, Williamson Legacy Group has adopted certain procedures designed to mitigate the effects of this conflict. For example, as part of Williamson Legacy Group's fiduciary duty to clients, Mr. Phelan will endeavor at all times to put the interest of clients first, and recommendations will only be made to the extent that they are reasonably believed to be suitable and in the best interests of the client. Additionally, material conflicts are disclosed to clients through this Brochure Supplement and Williamson Legacy Group's Brochure. Clients are not obligated to buy any insurance products through Mr. Phelan.

Supervision: See page 2

Jeanette Leann McCormick, Investment Adviser Representative

Year of Birth: 1972

Education Background:

- Purdue University, West Lafayette, Indiana, Bachelor of Science (1990-1994)

Business Background:

- Williamson Legacy Group, Investment Advisor Representative (03/2022 – Present)
- Axxcess Wealth Management, LLC, Investment Advisor Representative (08/2021 – 02/2022)
- Wells Fargo Clearing Services, LLC, Advisor and Registered Representative (02/2010 – 08/2021)
- Raymond James, Senior Client Associate (09/2008-01/2010)
- Wachovia Securities, Senior Client Associate (09/2001-09/2008)

Mailing address and contact number:
484 East Carmel Drive, #388
Carmel, Indiana 46032
317-447-3212

Disciplinary Information: None

Other Business and Professional Activities:

- Ms. McCormick currently holds the Retirement Income Certified Professional designation. See page 3 for additional information regarding this designation.

Additional Compensation: See page 2. In addition, Ms. McCormick is a licensed insurance agent. In such capacity Ms. McCormick may offer insurance products and receive a normal and customary commission as a result of such purchase. To the extent that Ms. McCormick recommends the purchase of insurance products where she may receive commissions for doing so, a conflict of interest exists because Ms. McCormick receives remuneration should a client elect to follow her recommendations, even if such recommendation is based on the best interest of clients and their needs. To address this conflict, Williamson Legacy Group has adopted certain procedures designed to mitigate the effects of this conflict. For example, as part of Williamson Legacy Group's fiduciary duty to clients, Ms. McCormick will endeavor at all times to put the interest of clients first, and recommendations will only be made to the extent that they are reasonably believed to be suitable and in the best interests of the client. Additionally, material conflicts are disclosed to clients through this Brochure Supplement and Williamson Legacy Group's Brochure. Clients are not obligated to buy any insurance products through Ms. McCormick.

Supervision: See page 2

Benjamin Charles Hecht, Investment Adviser Representative

Year of Birth: 1978

Education Background:

- Brigham Young University, Provo, Utah, Bachelor of Science (2000-2004)
- Brigham Young University, Provo, Utah, Masters of Science (2004-2006)
- Purdue University, West Lafayette, Indiana, PhD (2006 – 2013)

Business Background:

- Williamson Legacy Group, Investment Advisor Representative (03/2022 – Present)
- Axxcess Wealth Management, LLC, Investment Advisor Representative (08/2021 – 02/2022)
- Wells Fargo Clearing Services, LLC, Advisor and Registered Representative (09/2015 – 08/2021)

Mailing address and contact number:
484 East Carmel Drive, #388
Carmel, Indiana 46032
317-447-3212

Disciplinary Information: None

Other Business and Professional Activities: None

Additional Compensation: See page 2. In addition, Mr. Hecht is a licensed insurance agent. In such capacity Mr. Hecht may offer insurance products and receive a normal and customary commission as a result of such purchase. To the extent that Mr. Hecht recommends the purchase of insurance products where he may receive commissions for doing so, a conflict of interest exists because Mr. Hecht receives remuneration should a client elect to follow his recommendations, even if such recommendation is based on the best interest of clients and their needs. To address this conflict, Williamson Legacy Group has adopted certain procedures designed to mitigate the effects of this conflict. For example, as part of Williamson Legacy Group's fiduciary duty to clients, Mr. Hecht will endeavor at all times to put the interest of clients first, and recommendations will only be made to the extent that they are reasonably believed to be suitable and in the best interests of the client. Additionally, material conflicts are disclosed to clients through this Brochure Supplement and Williamson Legacy Group's Brochure. Clients are not obligated to buy any insurance products through Mr. Hecht.

Supervision: See page 2

Owen Patrick Williamson, Investment Adviser Representative

Year of Birth: 1991

Education Background:

- Indiana University, Bloomington, Indiana, Bachelor of Science in Public Affairs (2010-2014)

Business Background:

- Williamson Legacy Group, Investment Advisor Representative (03/2022 – Present)
- Axxcess Wealth Management, LLC, Investment Advisor Representative (08/2021 – 02/2022)

Business Address:
254 East Carmel Drive
Carmel, Indiana 4603

Disciplinary Information: None

Other Business and Professional Activities: None

Additional Compensation: See page 2. No additional compensation specific to Mr. Owen Williamson.

Supervision: See page 2