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Part 2B of Form ADV: Brochure Supplement
March 27, 2026

Alan H. Hensley

Financial Insights Wealth Management
1551 Broadway, Suite 600
Tacoma, WA 98402
253-627-6010

www.financialinsights.com

This Brochure Supplement provides information about our investment adviser representatives that supplements Financial Insights Wealth Management's brochure. You should have received a copy of that brochure. Please contact Jordan Ford, Chief Compliance Officer of Financial Insights Wealth Management, if you did not receive Financial Insights Wealth Management's brochure or if you have any questions about the contents of this supplement.

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Item 2: Educational, Background and Business Experience

Name: Alan H. Hensley, CFP®, Wealth Advisor
CRD#: 5379067
Born: 1983

Education
- University of Washington, Bachelors Arts in Economics

Recent Business Experience
- Vice President & Wealth Advisor, Financial Insights Wealth Management, 2023 to present
- Wealth Advisor, Merriman Wealth Management, LLC, 2018 to 2023
- Associate Advisor, Merriman Wealth Management, LLC, 2016 to 2018
- Financial Advisor, LPL Financial, LLC, 2011 to 2016

Professional Designation(s)
Alan H. Hensley is certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, he may refer to himself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and he may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at www.cfp.net.

CFP® professionals have met CFP Board's high standards for education, examination, experience, and ethics. To become a CFP® professional, an individual must fulfill the following requirements:
- Education – Earn a bachelor's degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials.
- Examination – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual's ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.
- Experience – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.
- Ethics – Satisfy the Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement and agree to be bound by CFP Board's Code of Ethics and Standards of Conduct ("Code and Standards"), which sets forth the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements to remain certified and maintain the right to continue to use the CFP Board Certification Marks:
- Ethics – Commit to complying with CFP Board's Code and Standards. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP®

professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.

- Continuing Education – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

Item 3: Disciplinary Information

Alan H. Hensley has no reportable disciplinary history.

Item 4: Other Business Activities

Alan H. Hensley is not engaged in any other investment-related activities that provides substantial compensation or involves a substantial amount of his time.

Item 5: Additional Compensation

Alan H. Hensley does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Item 6: Supervision

The executive management team of Financial Insights Wealth Management is responsible for the supervision of all employees and the Investment Committee is responsible for the oversight of investment advice provided to clients. The Investment Committee documents and oversees investment meetings, all material investment policy changes, and conducts periodic reviews of client portfolios to ensure that client objectives and mandates are being met. Jordan Ford, as her role as Chief Compliance Officer, is responsible for the direct supervision of Alan H. Hensley's advisory activities on behalf of Financial Insights Wealth Management.

Jordan Ford may be reached at 253-627-6010.

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March 27, 2026

Alexandria A. Kemp

Financial Insights Wealth Management
1551 Broadway, Suite 600
Tacoma, WA 98402
253-627-6010

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Item 2: Educational, Background and Business Experience

Name: Alexandria A. Kemp, CFP®, EA, CEO
CRD#: 6209364
Born: 1984

Education
- Graduated from Pacific Lutheran University with a BA
- Certified Financial Planner (CFP®) Professional Education Program, College of Financial Planning

Recent Business Experience
- CEO, Financial Insights Wealth Management, 2022 to present
- CEO & CCO, Financial Insights Wealth Management, 2023 to 2025
- CEO, Financial Insights Wealth Management, 2022 to 2023
- President & CCO, Financial Insights Wealth Management, 2014 to 2022

Professional Designation(s)

CFP® (Certified Financial Planner): Alexandria A. Kemp is certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, she may refer to herself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and she may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at www.cfp.net.

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- Experience – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.
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CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.

- Continuing Education – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

Enrolled Agent (EA): An enrolled agent is a person who has earned the privilege of representing taxpayers before the Internal Revenue Service by either passing a three-part comprehensive IRS test covering individual and business tax returns, or through experience as a former IRS employee. Enrolled agent status is the highest credential the IRS awards. Individuals who obtain this elite status must adhere to ethical standards and complete 72 hours of continuing education courses every three years. Enrolled agents, like attorneys and certified public accountants (CPAs), have unlimited practice rights. This means they are unrestricted as to which taxpayers they can represent, what types of tax matters they can handle, and which IRS offices they can represent clients before. Learn more about enrolled agents in Treasury Department Circular 230.

Item 3: Disciplinary Information

Alexandria A. Kemp has no reportable disciplinary history.

Item 4: Other Business Activities

Alexandria A. Kemp is also part owner of Kemp & Co Construction LLC, a Tacoma-based limited liability company that purchases real estate property. She spends approximately 15 hours a month on this activity, none of which are during securities trading hours. This activity does not involve any clients of Financial Insight Wealth Management.

Item 5: Additional Compensation

Alexandria A. Kemp does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Item 6: Supervision

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March 27, 2026

Amanda M. Burrows

Financial Insights Wealth Management
1551 Broadway, Suite 600
Tacoma, WA 98402
253-272-2927

www.financialinsights.com

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Item 2: Educational, Background and Business Experience

Name: Amanda M. Burrows, CFP®, CSRIC®, Wealth Advisor
CRD#: 859811
Born: 1987

Education

- Graduated Washington State University with a BA
- Certified Financial Planner (CFP®) Professional Education Program, College of Financial Planning

Recent Business Experience

- Principal, Financial Insights, 2019 to present
- Private Client Advisor, J.P. Morgan Securities LLC; 2012-2018
- Sales Assistant, Chase Investment Services Corp.; 2009-2012

Professional Designation(s)

CFP® (Certified Financial Planner): Amanda M. Burrows is certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, she may refer to herself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and she may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at www.cfp.net.

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CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.

- Continuing Education – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

CSRIC® (Chartered Socially Responsible Investment Counselor): The Chartered SRI Counselor℠ , or CSRIC® program, is a designation program that provides a blend of foundational knowledge and scenario learning to work with sustainable, responsible, and impact (SRI) investments, alongside environmental, social, and governance (ESG) factors, for a variety of clients. This program provides financial advisors and investment professionals with a foundation knowledge of the history, definitions, trends, portfolio construction principles, fiduciary responsibilities, and best practices for sustainable investing.

To obtain the designation, advisors must enroll in the CSRIC program offered by Kaplan Financial Education and pass the final exam. Individuals who hold a professional designation authorized by the College are responsible for completing 16 hours of continuing education (CE) credits every two years.

Item 3: Disciplinary Information

Amanda M. Burrows has no reportable disciplinary history.

Item 4: Other Business Activities

Amanda M. Burrows is not engaged in any other investment-related activities that provides substantial compensation or involves a substantial amount of her time.

Item 5: Additional Compensation

Amanda M. Burrows has no reportable additional compensation.

Item 6: Supervision

The executive management team of Financial Insights Wealth Management is responsible for the supervision of all employees and the Investment Committee is responsible for the oversight of investment advice provided to clients. The Investment Committee documents and oversees investment meetings, all material investment policy changes, and conducts periodic reviews of client portfolios to ensure that client objectives and mandates are being met. Jordan Ford, as her role as Chief Compliance Officer, is responsible for the direct supervision of Amanda M. Burrows' advisory activities on behalf of Financial Insights Wealth Management

Jordan Ford may be reached at 253-627-6010.

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Jordan Ford

Financial Insights Wealth Management
1551 Broadway, Suite 600
Tacoma, WA 98402
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Item 2: Educational, Background and Business Experience

Name: Jordan Ford, IACCP, Chief Compliance Officer & Director of Business Operations
CRD#: 7911039
Born: 1986

Education

- Seattle University, Bachelors of Arts in Interdisciplinary Arts & Communication Studies

Recent Business Experience

- Chief Compliance Officer & Director of Business Operations, Financial Insights Wealth Management, 2025 to present
- Business Operations and Human Resources Manager, Financial Insights Wealth Management, 2022 to 2025
- Commercial Building Property, Ford Center, 2020 to present
- Self-Employed, Avelon Ballroom Event Space, 2020 to 2023
- Business Operations Manager/Minority Owner, Alternative Back Care Physical Therapy, 2008 to 2022

Professional Designation(s)

IACCP® (Investment Adviser Certified Compliance Professional): The IACCP® is specifically designed for compliance professionals wanting to certify their knowledge of investment adviser regulatory obligations and requirements. The designation is co-sponsored by COMPLY and the Investment Adviser Association (IAA). To earn the designation, candidates must complete coursework that generally spans 18 months. The program consists of 17 required compliance courses, 3 elective courses, submission of ethics commitment and assessment, passing the IACCP certifying examination, and 2 years of work experience. To maintain the designation, designees must complete 12 hours of continuing education annually, including 2 hours specifically focused on ethics.

Item 3: Disciplinary Information

Jordan Ford has no reportable disciplinary history.

Item 4: Other Business Activities

Jordan Ford does not have any outside business activity.

Item 5: Additional Compensation

Jordan Ford does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Item 6: Supervision

The executive management team of Financial Insights Wealth Management is responsible for the supervision of all employees and the Investment Committee is responsible for the oversight of investment advice provided to clients. The Investment Committee documents and oversees investment meetings, all material investment policy changes, and conducts periodic reviews of client portfolios to ensure that client objectives and mandates are being met. Alexandria (“Ali”) Kemp, as her role as CEO, is responsible for the direct supervision of Jordan Ford’s advisory activities on behalf of Financial Insights Wealth Management

Ali Kemp may be reached at 253-627-6010.

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October 01, 2025

Daniel J. McCaffrey

Financial Insights Wealth Management
1551 Broadway, Suite 600
Tacoma, WA 98402
253-627-6010
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Item 2: Educational, Background and Business Experience

Name: Daniel J. McCaffrey, Sr. Portfolio Manager
CRD#: 6629486
Born: 1990

Education
Graduated Whitworth University with a Bachelor of Arts in Economics

Recent Business Experience
Sr. Portfolio Manager, Financial Insights, 2013 to present

Item 3: Disciplinary Information

Daniel J. McCaffrey has no reportable disciplinary history.

Item 4: Other Business Activities

Daniel J. McCaffrey is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of his time.

Item 5: Additional Compensation

Daniel J. McCaffrey does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Item 6: Supervision

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Jordan Ford may be reached at 253-627-6010.

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Dorothy A. Lewis

Financial Insights Wealth Management
1551 Broadway, Suite 600
Tacoma, WA 98402
253-627-6010
www.financialinsights.com

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Item 2: Educational, Background and Business Experience

Name: Dorothy A. Lewis, CFP®, MA, Founder
CRD#: 1042516
Born: 1946

Education
- Attended Washington State University
- Graduated from the University of Puget Sound with a BA
- Graduated from the University of Washington with an MA
- Certified Financial Planner (CFP®) Professional Education Program, College of Financial Planning

Recent Business Experience
- Founder, Financial Insights Wealth Management, 2022 to present
- President, Financial Insights Wealth Management, 1981 to 2022
- Registered Representative, Pacific West Securities, 1982 to 1984
- Registered Principal, Raymond James Financial Services, Inc., 1984 to 2006
- Registered Representative and Branch Manager, Raymond James Financial Services, Inc., 1984 to 2006

Professional Designation(s)
Dorothy A. Lewis is certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, she may refer to herself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and she may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at www.cfp.net.

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- Continuing Education – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

Item 3: Disciplinary Information

Dorothy A. Lewis has no reportable disciplinary history.

Item 4: Other Business Activities

Dorothy A. Lewis is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of his time.

Item 5: Additional Compensation

Dorothy A. Lewis does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Item 6: Supervision

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Jordan Ford may be reached at 253-627-6010.

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October 01, 2025

John J. Walsh

Financial Insights Wealth Management
1551 Broadway, Suite 600
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253-272-2927

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Item 2: Educational, Background and Business Experience

Name: John J. Walsh, CFP®, Wealth Advisor
CRD#: 1500930
Born: 1943

Education
- Graduated Long Beach City College with an AA in Business
- Attended Cal State University, Long Beach
- Certified Financial Planner (CFP®) Professional Education Program

Recent Business Experience
- Wealth Advisor, Financial Insights; 2015 to present
- Investment Advisor Representative and Registered Representative, Purshe Kaplan Sterling Investments, Inc.; 2015 to 2019
- John J. Walsh, CFP, Tax Preparer, 1969 to 2023
- Registered Representative and Investment Adviser Representative, NEXT Financial Group; 2009 to 2015

Professional Designation(s)
John J. Walsh is certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, he may refer to himself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and he may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at www.cfp.net.

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- Continuing Education – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

Item 3: Disciplinary Information

John J. Walsh has no reportable disciplinary history.

Item 4: Other Business Activities

John J. Walsh is not engaged in any other investment-related activities that provides substantial compensation or involves a substantial amount of his time.

Item 5: Additional Compensation

John J. Walsh does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Item 6: Supervision

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Jordan Ford may be reached at 253-627-6010.

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October 01, 2025

Michael W. Dunbar

Financial Insights Wealth Management
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Item 2: Educational, Background and Business Experience

Name: Michael (Mike) W. Dunbar, CFP®, Wealth Advisor and Principal
CRD#: 1221526
Born: 1951

Education

- Graduated Washington State University with a BA in Business Administration
- Graduated Washington State University with a BS in Psychology
- Certified Financial Planner (CFP®) Professional Education Program, College of Financial Planning

Recent Business Experience

- Wealth Advisor and Principal, Financial Insights, 2015 to present
- Investment Advisor Representative, Registered Representative and Principal, Purshe Kaplan Sterling Investments, Inc., 2015 to 2019
- Member, Michael Dunbar, CFP LLC, Tax Preparer, 2005 to 2023
- Investment Advisor Representative, Registered Principal and Registered Representative, NEXT Financial Group, 2009 to 2015

Item 3: Disciplinary Information

Mike W. Dunbar has no reportable disciplinary history.

Item 4: Other Business Activities

Mike W. Dunbar is not engaged in any other investment-related activities that provides substantial compensation or involves a substantial amount of his time.

Item 5: Additional Compensation

Michael W. Dunbar does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Item 6: Supervision

The executive management team of Financial Insights Wealth Management is responsible for the supervision of all employees and the Investment Committee is responsible for the oversight of investment advice provided to clients. The Investment Committee documents and oversees investment meetings, all material investment policy changes, and conducts periodic reviews of client portfolios to ensure that client objectives and mandates are being met. Jordan Ford, as her role as Chief Compliance Officer, is responsible for the direct supervision of Michael W. Dunbar's advisory activities on behalf of Financial Insights Wealth Management

Jordan Ford may be reached at 253-627-6010.