

Part 2A of Form ADV: Firm *Brochure*

Item 1 Cover Page

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This brochure provides information about the qualifications and business practices of Wealth Oklahoma. If you have any questions about the contents of this brochure, please contact us at 918-745-6060 or info@wealthoklahoma.com. The information in this brochure has not been approved or verified by the United States Securities and Exchange Commission (“SEC”) or by any state securities authority.

Additional information about Wealth Oklahoma also is available on the SEC’s website at www.adviserinfo.sec.gov. Wealth Oklahoma’s CRD number is 132962.

Item 2 Material Changes

This section summarizes the material changes to the Wealth Oklahoma Form ADV Firm Brochure since the filing of our last annual updating amendment of Form ADV Part 2A, dated January 3, 2025.

There have been no material changes to note in this current document. However, we have updated Item 8 to provide additional risk disclosures, including the following:

- Legal and Regulatory Matters Risks
- System Failures and Reliance on Technology Risks
- Cybersecurity Risk
- Pandemic Risks
- Emerging Technology (e.g., Artificial Intelligence) Risks.

We have made other changes, some of which may clarify or enhance existing disclosures, but we do not consider these other changes to be material.

At least annually, Wealth Oklahoma will provide you with a copy of our updated Form ADV Part 2A (“Brochure”) or a summary of material changes from the Brochure previously provided to you. Please retain this document for your future reference as it contains important information about our advisory services. Wealth Oklahoma will not provide an updated Brochure in the 12 months following the date of this Brochure unless there are material changes to disclose. You may also obtain a copy of our current Brochure at any time on the SEC’s website at www.sec.gov.

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Item 4 Advisory Business

Wealth Oklahoma operates under the legal entity, The Stolper Company L.L.C. (“We,” “Our”) which was founded in 2002. We recently adopted the “Wealth Oklahoma” name as a Doing Business As (DBA) designation to better reflect its current branding and strategic direction. Despite the DBA name change, we have maintained continuous advisory services under the same legal entity. Wealth Oklahoma is equally owned by Jon Stolper, who is the Chief Investment Officer and Portfolio Manager and Angela Stolper. We provide portfolio management for clients through discretionary accounts for a fee based on a percentage of the assets under management. We also publish quarterly newsletters free of charge to clients and prospects. We focus primarily on serving the needs of individuals, trusts, estates, charitable organizations, corporations, and other business entities.

As of December 31, 2025, Wealth Oklahoma had the following in assets under management:

Discretionary:	\$356,289,476
Non-Discretionary:	\$ <u> 0</u>
Total Assets:	\$356,289,476

Advisory services are tailored to the needs of each client’s specific situation. However, clients are not allowed to impose restrictions on investments at this time. For more information regarding our methods of analysis and investment strategies, please refer to Methods of Analysis, Investment Strategies and Risk of Loss sections of this Brochure.

The only advisory accounts offered by Wealth Oklahoma are discretionary wrap programs. These programs are not the lowest cost alternative for all investors, particularly “buy and hold” investors and investors in fixed-income securities. Our Investment Adviser Representatives (“IARs”) have a financial incentive to recommend the wrap programs, which creates an inherent conflict of interest. Wealth Oklahoma ensures that this conflict of interest is addressed in the following ways:

- Disclosing all identified conflicts of interest prior to making recommendations to clients. The disclosures are made in writing (via this Brochure and Form CRS) and verbally when discussing recommendations with clients.

- Only recommending accounts that are in a client’s best interest, ensuring that our recommendations align with the client’s stated investment objectives, investment timeframe, financial condition, tax status, and risk profile. Examples in which we might recommend an Advisory account include:
 - Clients with more than \$100,000 to invest
 - Clients seeking discretionary investment management
 - Clients with a long-term investment horizon
 Examples in which we might recommend a Brokerage account include:
 - Clients with less than \$100,000 to invest
 - Clients seeking fixed income investments totaling more than \$100,000
 - Clients seeking a “buy and hold” investment strategy
 - Clients with short-term investment horizons
 - Clients who prefer making their own investment decisions
- Prohibiting compensation or other benefits (financial or otherwise) to our IARs that might provide incentive to make recommendations against the client’s best interest – for example, compensation based on quotas, bonuses, sales contests, special awards based on the product sold, accounts recommended, AUM, or services provided; forgivable loans based upon the achievement of specified performance goals related to asset accumulation, revenue benchmarks, client transfer, or client retention.
- Allowing our IARs to also serve as Registered Representatives (“RRs”) of Raymond James Financial Services, Inc. (RJFS), member FINRA/SIPC, a broker-dealer that offers more appropriate vehicles for investors whose best interest is not served by a discretionary wrap program. Jon Stolper, Saletha Fuller, Allison (Ally) Stolper and Karen Bruns are RR of RJFS and Susan McDonald is not.

Sub-Advisory Arrangements

Wealth Oklahoma offers to our clients a number of Raymond James &

Associates' ("RJA"), member NYSE/SIPC managed wrap programs, including the Freedom Foundation Program under a sub-advisory agreement with RJA. Our advisors work with our clients to choose an appropriate program and help the client select the managers, strategies, or disciplines within the programs, as applicable. Once the client selects the program, RJA is appointed as a discretionary investment adviser under the appropriate advisory agreement. In this way, RJA acts as a subadviser to directly (or indirectly through other subadvisers) manage clients' assets through the selected program. Both RJA and Wealth Oklahoma advisors receive a portion of the advisory fee paid by the client.

IRA Rollover Recommendations

For the purpose of complying with the DOL's Prohibited Transaction Exemption 2020-02 ("PTE 2020-02") when applicable, we are providing the following acknowledgment to clients.

When we provide investment advice to clients regarding their retirement plan account or individual retirement account, we are a fiduciary within the meaning of Title I of the Employee Retirement Income Security Act and/or the Internal Revenue Code, as applicable, which are laws governing retirement accounts. The way we make money creates some conflicts with your interests, so we operate under an exemption that requires us to act in the clients' best interest and not put our interest ahead of the clients. Under this exemption, we must:

- Meet a professional standard of care when making investment recommendations (give prudent advice);
- Never put our financial interests ahead of the clients when making recommendations (give loyal advice);
- Avoid misleading statements about conflicts of interest, fees, and investments;
- Follow policies and procedures designed to ensure that we give advice that is in the clients' best interest;
- Charge no more than is reasonable for our services; and
- Give the clients basic information about conflicts of interest.

We benefit financially from the rollover of the clients' assets from a

retirement account to an account that we manage or advise, because the assets increase our assets under management and, in turn, our advisory fees. As a fiduciary, we only recommend a rollover when we believe it is in the clients' best interest.

Retirement Plan Services (“Held-Away” Assets)

If we provide you, as a plan participant, with individualized investment advice for your ERISA or non-ERISA plan assets, such as 401(k)s and 403(b)s, our advice is limited to the investment options approved by the plan. Because of this, our advisory services are limited to those available investment options. Your retirement account will be reviewed by us at least quarterly, and your financial professional will advise on allocation changes or rebalancing strategies when deemed necessary.

Item 5 Fees and Compensation

Wealth Oklahoma offers clients portfolio management services on a discretionary basis and charges an advisory fee for those services quarterly. When your Advisory Account is opened, the fee is billed for the remainder of the current billing period and is based on your initial contribution to the Account. The initial fee payment will be due in full on the date of Account inception. Subsequent quarterly fees will be calculated based on the Account Value, excluding any non-billable assets held in the Account, as of the last business day of the previous calendar quarter and will become due on the following business day. Clients authorize and direct RJA, as Custodian, to deduct asset-based fees from the client's account. The Custodian will deliver a quarterly statement to the client showing all amounts disbursed from the client's account, including fees paid to Wealth Oklahoma. Clients understand that account statements will show the amount of the asset-based fee. A full description of fees and services is provided in the RJA Master Advisory Agreement (“MAA”) prior to opening an account.

FEE SCHEDULE

Account Value	Quarterly Fee	Annualized Fee
\$100,000 to \$1 million	0.2500%	1.00%
\$1 million to \$5 million	0.1875%	0.75%
\$5 million to \$10 million	0.1625%	0.65%
Over \$10 million	0.1500%	0.60%

Cash Balances: Clients that hold cash balances greater than 20% of their overall Account Value as of the last business day of the quarter (“the valuation date”) for three consecutive quarterly valuation dates will have the cash balance above 20% excluded from the Account Value used to calculate advisory fees. Please refer to the “Billing on Cash Balances Held in Ambassador Accounts” section of the RJA Wrap Fee Program brochure (<https://www.raymondjames.com/-/media/rj/dotcom/files/legal-disclosures/rja-wrap-fee-program.pdf>) for additional information.

Non-Billable Assets: Clients that hold securities and other assets designated as “non-billable” are not assessed advisory fees on these positions. As a result, the Account Value upon which the advisory fee rate is applied will not include the value of these positions, although these positions will be included on the account statement. Please note that these non-billable assets may not be designated as such on your account statement. Please refer to the “Non-Billable Assets” section of the RJA Wrap Fee Program brochure (<https://www.raymondjames.com/-/media/rj/dotcom/files/legal-disclosures/rja-wrap-fee-program.pdf>) for additional information.

If cash or securities, or a combination thereof, amounting to at least \$100,000 are deposited to or withdrawn from your Account on an individual business day in the first two months of the quarter, you authorize Adviser and the Asset Management Services division of RJA (“AMS”) to: (i) assess fees to the deposited billable assets based on the value of the billable assets on the date of deposit for the pro rata number of days remaining in the quarter, or (ii) refund prepaid fees based on the value of the billable assets on the date of withdrawal for the pro rata number of days remaining in the quarter. No additional fees or adjustments to previously assessed fees will be made in connection with deposits or withdrawals that occur during the last month of the quarter unless at your request, subject to AMS’ approval, in its sole discretion; AMS may take

any action it considers fair and reasonable with respect to the application of fee adjustments based upon its review of the timing and amounts of deposits to and withdrawals from Client's Accounts, inclusive of when the source and destination of deposits and withdrawals involve Client's other fee-based advisory accounts. Additional information regarding fee calculation and assessment following termination of the Master Account Agreement is in the "Termination and Conversion" section of the MAA.

If you have more than one advisory account with us, you may request to have your related accounts combined for billing purposes so that each account will pay a fee that is calculated based on the aggregate "Relationship Value" (that is, the combined account Values, minus any non-billable assets held in the accounts, of all related advisory accounts). We automatically combine all accounts using the same billing address for billing purposes. For business owners with company accounts, we combine those accounts with their personal accounts for billing purposes. Please talk to us about how we are combining your accounts. We reserve the right to determine whether accounts are "related" at our sole discretion.

Wealth Oklahoma offers clients discretionary wrap accounts that are held by Raymond James & Associates, Inc. ("RJA"). These are the only accounts offered by Wealth Oklahoma. Non-discretionary advisory accounts are available in the marketplace but are not offered by Wealth Oklahoma.

A wrap program is a discretionary account that has no transaction fees or individual commissions and can be a good alternative for investors who are interested in an actively managed portfolio. Wrap programs also give smaller investors access to professional portfolio managers.

Infrequently traded portfolios incur fewer fees in a traditional brokerage account than in a wrap program account. Therefore, Wealth Oklahoma does not recommend its advisory services to "buy-and-hold" investors. These investors are recommended traditional brokerage accounts.

Discretionary wrap programs are the only advisory accounts offered by Wealth Oklahoma. These programs are not the lowest cost alternative for all investors, particularly "buy and hold" investors and investors in fixed-income securities. Our IARs have a financial incentive to recommend the wrap programs, which creates an inherent conflict of interest as discussed in Item 4 above.

For more details about the wrap fee program, please see RJA's Wrap Fee Program Brochure here:

<https://www.raymondjames.com/-/media/rj/dotcom/files/legal-disclosures/rja-wrap-fee-program.pdf>.

Individual bonds that are purchased with a “buy and hold” strategy in discretionary fee-based advisory accounts will be assessed higher fees than comparable assets purchased and held in separate brokerage accounts.

If you are an investor who is interested in ongoing advice, asset management, and monitoring of your portfolio, an advisory account may be most appropriate for you. If, on the other hand, you prefer a “buy and hold” strategy and only require advice at the time of your investment, a brokerage account is generally more cost effective. Some investors maintain both advisory and brokerage accounts to meet their investment needs. Be sure to research different types of investment accounts and compare them with your investment needs before opening an advisory account with us.

Some of our IARs are also RRs of Raymond James Financial Services, Inc.; member FINRA/SIPC, a broker-dealer firm (“RJFS”). It is important for you to understand the ways our IARs make money, and how these pose conflicts of interest:

- Wealth Oklahoma and its IARs are paid a percentage of the assets under management at any given time. We have a financial incentive to encourage you to hold more of your assets in our discretionary wrap program accounts. This presents a conflict of interest, particularly with clients with a “buy and hold” investment strategy, who would have lower costs in a brokerage account.
- RRs of RJFS are paid commissions and transaction fees based on sales of securities and is paid 12B-1 fees on the sale of mutual funds. RRs have a financial incentive to encourage you to purchase securities, insurance, and mutual funds. This presents a conflict of interest, particularly for clients who would benefit from an actively managed portfolio.
- As an insurance agent with Raymond James Insurance Group, Jon Stolper, Saletha Fuller and Ally Stolper are paid commissions on sales of insurance and insurance-related products. They have a financial incentive to encourage you to purchase insurance and

insurance-

related products. This presents a conflict of interest.

- Susan McDonald is an employee of Wealth Oklahoma. Her compensation consists of a salary and participation in an annual bonus pool. Ms. McDonald does not advise any clients and has no financial incentives arising from any specific client investments.

Jon Stolper, Saletha Fuller and Ally Stolper mitigate the inherent conflicts of interest by offering both advisory and brokerage services and by maintaining and adhering to a strict code of ethics.

- As both IARs of Wealth Oklahoma and RRs of RJFS, Jon Stolper, Saletha Fuller and Ally Stolper have a financial incentive to recommend that clients sell securities in their brokerage account(s) to generate commissions and move those funds into their advisory account to generate fee revenue. This presents a potential conflict of interest. A recommendation to sell a security to invest in an advisory account is made with great care and consideration. Factors such as concentration risk, investment goals, tax implications and investment time horizon are documented before discussing the pros and cons of implementing any investment strategy with the client.

Service charges may be imposed by the Custodian for specific account services. These types of charges are separate from Wealth Oklahoma and are disclosed separately. See the Brokerage Practices section for more information.

Clients may terminate the agreement at any time by notifying Wealth Oklahoma in writing. In the event of termination, all unearned fees will be refunded.

Sub-Advisory Arrangements

For sub-advisors that we engage directly, we pay a portion of the advisory fee that you pay to us to the sub-advisor while the Sub-Advisory Agreement remains in effect. The sub-advisory fee will not be greater than 1.00%. If the Sub-Advisory Agreement is terminated prior to the end of the quarter, the sub-advisory fee shall be prorated up to the date of termination for the period in which investment advisory services were provided by the sub-advisor.

In addition, certain sub-advisory arrangements require that you engage the sub-advisor directly. Under this scenario you will directly engage and pay the sub-advisor per their advisory agreement. Your IAR can assist you with this process, but the ultimate terms are agreed to between you and the sub-adviser.

Item 6 Performance-Based Fees and Side-By-Side Management

Performance-based fee arrangements involve the payment of fees based on a share of capital gains or capital appreciation of a client's account. Side-by-side management refers to the practice of managing accounts that are charged performance-based fees while at the same time managing accounts that are not charged performance-based fees. Wealth Oklahoma does not use a performance-based fee structure or participate in any side-by-side management.

Item 7 Types of Clients

Wealth Oklahoma provides services to the following types of clients:

- Individuals
- High Net Worth Individuals
- Trusts
- Estates
- Corporations not listed above
- Foundations

Wealth Oklahoma has a minimum account size of \$100,000.00. However, we may negotiate minimum account sizes at its sole discretion.

Item 8 Methods of Analysis, Investment Strategies and Risk of Loss

Methods of Analysis and Investment Strategies

Wealth Oklahoma uses fundamental securities analysis in formulating investment advice and managing assets. Fundamental analysis examines all the material factors of:

- the individual security,
- the company or entity offering the security,
- industry in which the company or entity operates, and
- the overall economy.

Wealth Oklahoma employs the following types of investment strategies in formulating investment advice and managing assets:

- Long-term purchases (held for more than a year)
- Short-term purchases (held for less than a year)

Wealth Oklahoma currently offers six separate actively managed portfolio strategies:

Equity Value Portfolio: This portfolio typically comprises from 25 to 30 individual stocks. Wealth Oklahoma employs a value-based approach in selecting stocks and portfolio members are predominantly large capitalization companies in a diversified number of industries.

Equity Income Portfolio: This portfolio also typically comprises from 25 to 30 individual stocks and Wealth Oklahoma employs the same fundamental investment criteria as for the Equity Value Portfolio. An additional criterion is that portfolio members typically produce a dividend yield that is above the market's average.

Strategic Income Portfolio: This portfolio is invested in a broad range of securities through the active selection of both Exchange-Traded Funds (ETFs) and Closed End Funds (CEFs). This program aims to provide clients with an attractive yield on capital invested, while managing risk within reasonable parameters. The portfolio contains a mix of both equity and fixed income investments.

Strategic Equity Portfolio: This portfolio is invested in a broad range of securities through the active selection of both Exchange-Traded Funds (ETFs) and Closed End Funds (CEFs). This program aims to provide clients with broad exposure to both domestic and international equity markets while managing risk within reasonable parameters.

The portfolio is typically more heavily weighted towards domestic equities.

Balanced Portfolio – Equity Value: A proportion of this portfolio (70% at investment inception) is invested in the Equity Value Portfolio and the remainder is allocated to fixed income instruments. Specific fixed income securities are selected based on income and risk parameters with a bias towards higher grade instruments, typically U.S. Treasury notes and bills.

Balanced Portfolio—Equity Income: A proportion of this portfolio (70% at investment inception) is invested in the Equity Income Portfolio and the remainder is allocated to fixed income instruments. Specific fixed income securities are selected based on income and risk parameters with a bias towards higher grade instruments, typically U.S. Treasury notes and bills.

In addition to the actively managed portfolio strategies, Wealth Oklahoma may recommend that clients implement customized fixed income investments on a brokerage basis. Recommendations are based on a client's individual goals within suitable risk management parameters. Investments considered comprise a range of domestic investment grade securities, with a bias towards higher grade instruments, and may include Treasuries and CDs, as well as municipal, corporate and U.S. Government agency debt. The choice to offer fixed income investments to a client within a managed program or on a brokerage basis is made within the client's best interests, including fees incurred.

Risks

Clients investing in securities should be aware of the risks involved. With fundamental analysis, the IAR is using historical information, which may not predict the future outcome of a security. Additionally, each investment strategy may entail unique risks including the possibility of incurring a loss. In a long-term investment strategy, returns may be adversely affected

by market downturns. A short-term investment strategy is susceptible to current market volatility.

Risk of Loss. Securities investments are not guaranteed, and investors may lose money on their investments. We ask that clients work with us to help us understand their tolerance for risk.

Legal and Regulatory Matters Risks. Legal developments which may adversely impact investing and investment-related activities can occur at any time. “Legal Developments” means changes and other developments concerning foreign, as well as US federal, state and local laws and regulations, including adoption of new laws and regulations, amendment or repeal of existing laws and regulations, and changes in enforcement or interpretation of existing laws and regulations by governmental regulatory authorities and self-regulatory organizations (such as the SEC, the US Commodity Futures Trading Commission, the Internal Revenue Service, the US Federal Reserve and the Financial Industry Regulatory Authority). Our management of accounts may be adversely affected by the legal and/or regulatory consequences of transactions effected for the accounts. Accounts may also be adversely affected by changes in the enforcement or interpretation of existing statutes and rules by governmental regulatory authorities or self-regulatory organizations.

System Failures and Reliance on Technology Risks. Our investment strategies, operations, research, communications, risk management, and back-office systems rely on technology, including hardware, software, telecommunications, internet-based platforms, and other electronic systems. Additionally, parts of the technology used are provided by third parties and are, therefore, beyond our direct control. We seek to ensure adequate backups of hardware, software, telecommunications, internet-based platforms, and other electronic systems, when possible, but there is no guarantee that our efforts will be successful. In addition, natural disasters, power interruptions and other events may cause system failures, which will require the use of backup systems (both on- and off-site). Backup systems may not operate as well as the systems that they back up and may fail to properly operate, especially when used for an extended period. To reduce the impact a system failure may have, we continually evaluate our backup and disaster recovery systems and perform periodic checks on the backup systems’ conditions and operations. Despite our monitoring, hardware, telecommunications, or other electronic systems malfunctions may be unavoidable, and result in consequences such as the

inability to trade for or monitor client accounts and portfolios. If such circumstances arise, the Investment Committee will consider appropriate measures for clients.

Cybersecurity Risk. A portfolio is susceptible to operational and information security risks due to the increased use of the internet. In general, cyber incidents can result from deliberate attacks or unintentional events. Cyberattacks include, but are not limited to, infection by computer viruses or other malicious software code, gaining unauthorized access to systems, networks, or devices through “hacking” or other means for the purpose of misappropriating assets or sensitive information, corrupting data, or causing operational disruption. Cybersecurity failures or breaches by third-party service providers may cause disruptions and impact on service providers’ and our business operations, potentially resulting in financial losses, the inability to transact business, violations of applicable privacy and other laws, regulatory fines, penalties, reputational damage, reimbursement, or other compensation costs, and/or additional compliance costs. While we have established business continuity plans and risk management systems designed to prevent or reduce the impact of such cyberattacks, there are inherent limitations in such plans and systems due in part to the everchanging nature of technology and cyberattack tactics.

Pandemic Risks. The novel coronavirus rapidly became a pandemic and resulted in disruptions to the economies of many nations, individual companies, and the markets in general, the impact of which was material. This created closed borders, quarantines, supply chain disruptions and general anxiety, negatively impacting global markets in an unforeseeable manner. The impact of the novel coronavirus and other such future infectious diseases in certain regions or countries may be greater or less due to the nature or level of their public health response or due to other factors. Health crises caused by the coronavirus outbreak and future infectious diseases may exacerbate other pre-existing political, social, and economic risks in certain countries. The impact of such health crises may be quick, severe and of unknown duration. These pandemics and other epidemics and pandemics that may arise in the future could result in continued volatility in the financial markets and could have a negative impact on investment performance.

Emerging Technology. From time to time, we will use emerging technologies, such as artificial intelligence (“AI”), as a complement to operational and investment research processes. We can also invest in

companies developing or leveraging emerging technology. Emerging technology and AI are wide-ranging terms and include a broad spectrum of technologies and applications, such as machine learning, deep learning, neural networks, and natural language processing, that are quickly evolving. Such emerging technology and AI present unique risks. For example, the automation of tasks previously performed by humans can potentially lead to job displacement and economic disruption. Data privacy concerns arise when AI systems collect and analyze vast amounts of personal data, which can be misused or inadequately protected. Additionally, the rapid development of these technologies often outpaces the creation of appropriate regulations, resulting in ethical challenges such as bias in AI algorithms and the potential for misuse in surveillance, investment decisions or other biases. New security vulnerabilities can also emerge as AI tools are developed, making systems potentially more susceptible to cyberattacks when using emerging AI technologies

The information contained in this brochure cannot disclose every potential risk associated with an investment strategy, nor all of the risks applicable to a particular manager, security, or investment. Risks vary by client according to their investment objectives, guidelines, liquidity needs or risk tolerance and not every strategy or portfolio will be exposed to each of the risks described in this brochure. This list is not intended to be exhaustive of all of the risks associated with investing in strategies or securities that are utilized or recommended by Wealth Oklahoma. Rather, it is a general description of the nature and risks of the investment advisory services provided by Wealth Oklahoma and the related investments.

Wealth Oklahoma typically recommends the following types of securities:

- Equity securities (exchange listed, over-the-counter, and foreign issuers)
- Exchange-Traded Funds
- Closed-End Funds
- Preferred securities
- Real Estate Investment Trusts
- Master Limited Partnerships
- Corporate debt securities (other than commercial paper)
- Commercial paper
- Certificates of Deposit

- Municipal securities
- U.S. Government securities

Item 9 Disciplinary Information

Wealth Oklahoma does not have any disciplinary history.

Item 10 Other Financial Industry Activities and Affiliations

Raymond James Financial Services: In addition to being IARs for Wealth Oklahoma, Jon Stolper, Saletha Fuller and Ally Stolper are also RRs of Raymond James Financial Services, Inc., member FINRA/SIPC (“RJFS”) a wholly owned subsidiary of Raymond James Financial, Inc. The brokerage services they provide through RJFS are separate from the advisory services they provide through Wealth Oklahoma. In their capacities as RRs of RJFS, Mr. Stolper, Ms. Fuller and Ms. Stolper recommend and offer brokerage services and products to Wealth Oklahoma clients. They receive separate and customary compensation when executing securities transactions as RRs at RJFS. As discussed above, Mr. Stolper, Ms. Fuller and Ms. Stolper’s methods of compensation for both brokerage and advisory services present conflicts of interest with clients which are mitigated by offering both types of services and by adherence to a strong code of ethics.

Raymond James Insurance Group: Mr. Stolper, Ms. Fuller and Ms. Stolper are also licensed insurance agents and sell insurance-related products through Raymond James Insurance Group (“RJIG”). The insurance services provided by Mr. Stolper, Ms. Fuller and Ms. Stolper are separate from the advisory services provided by Wealth Oklahoma. In their capacities as insurance agents, Mr. Stolper, Ms. Fuller and Ms. Stolper recommend and offer insurance products to Wealth Oklahoma clients. Mr. Stolper, Ms. Fuller and Ms. Stolper will receive separate and customary compensation for acting as an insurance agent and purchasing insurance and insurance related products.

Advisory clients are not obligated to purchase any of the brokerage of insurance products or to use any of the brokerage or insurance services offered by Mr. Stolper, Ms. Fuller and Ms. Stolper.

Raymond James & Associates: Wealth Oklahoma has entered into a sub-advisor relationship with unaffiliated registered investment adviser(s). In the Sub-Advisory Agreement, we agreed to provide discretionary investment management services for certain designated assets in client portfolios. Refer to Items 4 and 5 above for details of our business relationship and the compensation we receive.

Item 11 Code of Ethics, Participation or Interest in Client Transactions and Personal Trading

Pursuant to Rule 204A-1 under the Advisers Act, Wealth Oklahoma has adopted a Code of Ethics. Wealth Oklahoma monitors the personal securities transactions of its employees, officers, and IARs (“Access Persons”). The Code of Ethics (“COE”) sets forth standards of conduct and addresses conflicts of interest between its personnel and advisory clients. All investment advisory clients may request a copy of the Wealth Oklahoma Code of Ethics by contacting us at 918-745-6060. The COE ensures the following:

- The interests of Advisory clients will be placed first at all times. Access Persons must avoid serving their own personal interests ahead of the interests of our clients.
- Access Persons will conduct all personal securities transactions in full compliance with the COE, including full disclosure of all personal securities holdings, requesting pre-authorization for all personal securities transactions, and disclosure of all such transactions.
- Access Persons must comply with applicable federal laws.
- Access Persons must avoid taking inappropriate advantage of the Access Person’s position.

There may be occasions in which employees of Wealth Oklahoma buy or sell securities that it also recommends to clients. This creates a conflict of interest between the IAR/Access Person and clients in that the IAR/Access Person may receive execution at better pricing than clients. Wealth Oklahoma places client orders ahead of its Access Persons’ orders. The Custodian monitors transactions to ensure that clients get preferential treatment over our Access Persons. Wealth Oklahoma has put policies and procedures in place to ensure that the client’s interests always come first.

Item 12 Brokerage Practices

Wealth Oklahoma currently uses RJA as its Custodian and only offers advisory services for accounts held at RJA.

RJA has its own fees and costs as Custodian. These fees and costs are completely independent of Wealth Oklahoma's fees. Wealth Oklahoma does not receive any portion of the fees and costs charged by RJA.

Clients may incur charges for other elective account services provided by RJA which are not directly related to the advisory, execution, and clearing services provided as part of the wrap program. These fees include, but are not limited to, IRA custodial fees, safekeeping fees, interest charges on margin loans, and fees for legal or courtesy transfers of securities.

Exchange-traded funds ("ETFs") and closed-end funds incur separate management fees which are assessed by the fund directly. These management fees are in addition to the ongoing advisory fees and will generally result in clients paying more than clients investing in funds that do not hold ETFs or closed-end funds. Certain ETFs may be classified as partnerships for U.S. federal income tax purposes, which may result in unique tax treatment, including Schedule K-1 reporting. Additional information is also available in each ETF or closed-end fund prospectus, available upon request.

Best Execution: RJA, as the Custodian, is obligated to seek best execution for all trades; however, better executions may be available via another broker/dealer based on factors including volume, order flow, and market-making activity. By executing transactions through RJA, it is not guaranteed that a client will receive the most favorable execution of their trades, which in turn may cost clients more money. While other Custodians may offer similar services for less cost, a holistic analysis of factors such as quality of service and research, reputation, financial strength, length of relationship, and client satisfaction are all important considerations to the Advisor and must be considered in any decisions around which Custodian will provide services that are in the best interest of clients.

Soft Dollars: Wealth Oklahoma does not have any formal soft dollar arrangements. However, Wealth Oklahoma receives various services and

benefits from RJA. Wealth Oklahoma's financial arrangement with RJA is that RJA collects advisory fees from client accounts and then pays a portion of those fees to Wealth Oklahoma. RJA does not charge Wealth Oklahoma directly for any of the benefits listed below. These services include:

- Client statements and confirmations
- Research related products and tools
- Consulting services
- Access to a trading desk servicing advisor participants
- Access to block trading (which provides the ability to aggregate securities transactions for execution and then allocate the appropriate shares to client accounts)
- The ability to have advisory fees deducted directly from client accounts
- Access to an electronic communications network for client order entry and account information
- Discounts on compliance, marketing, research technology and practice management products or services provided to us by third party vendors
- Discounted or free educational sessions
- Discounted or free continuing education training

These benefits do not play a significant part in Wealth Oklahoma's decision to use RJA as our Custodian, as they are comparable to the benefits offered to advisers by other leading Custodial firms.

Wealth Oklahoma's decision to use RJA as Custodian for all advisory accounts combined with Jon Stolper, Saletha Fuller and Ally Stolper's work as RRs of RJFS and as insurance agents with RJIG creates a conflict of interest for clients, in that our business is linked with RJA, RJFS, and RJIG in ways that would make switching Custodians costly and difficult, should the need arise.

Wealth Oklahoma mitigates the inherent conflict of interest by working with a Custodian that it believes to be an industry leader. Wholistic reviews of factors such as quality of service and research, reputation, financial strength, length of relationship and client satisfaction have consistently reinforced Wealth Oklahoma's ongoing decision to use RJA as Custodian.

Trade Aggregation: Wealth Oklahoma will aggregate sale and purchase orders of securities held by its clients with similar orders being made simultaneously for other clients if such aggregation is reasonably likely to result in overall economic benefit to clients based on an evaluation that the clients are benefited by relatively better purchase or sale prices, lower commission expenses or beneficial timing of transactions, or a combination of these and other factors. In some instances, the purchase or sale of securities for clients will be effected simultaneously with the purchase or sale of like securities for other clients. Such transactions may be made at slightly different prices, due to the volume of securities purchased or sold. In such an event, the average price of all securities purchased or sold in such transactions is determined and the client may be charged or credited, as the case may be, the average transaction price.

Trade Errors: From time to time, a trade error may occur in submitting a trade order on your behalf. Trading errors include a number of situations, such as:

- The wrong security is bought or sold for a client,
- A security is bought instead of sold,
- A transaction is executed for the wrong account,
- Securities transactions are completed for a client that had a restriction on such security, or
- Securities are allocated to the wrong accounts.

When this occurs, we typically place a correcting trade with the Custodian. If an investment gain results from the corrective action, the gain will remain in your account unless it is legally not permissible for you to retain the gain, or we confer with you and you decide to forego the gain (e.g., due to tax reasons). If a loss occurs due to an administrative trade error, we are responsible and will pay for the loss to ensure that you are made whole.

To limit the respective administrative expenses and burden of processing small trade errors, it should be noted some custodians (at their own discretion) can choose not to invoice us if the trade error involves a de minimis dollar amount (usually less than \$100). Generally, if related trade errors result in both gains and losses in your account, they will be netted.

Item 13 Review of Accounts

The securities in each account and their underlying fundamentals are frequently reviewed by Wealth Oklahoma. Each account is reviewed no less than quarterly by an IAR. Clients receive confirmation of each transaction as well as monthly or quarterly statements from RJA. We will provide quarterly performance data.

Item 14 Client Referrals and Other Compensation

Wealth Oklahoma does not pay for or receive compensation for client referrals.

Wealth Oklahoma does not receive compensation or other economic benefit from a third-party custodian (including commissions, equipment, or non-research services).

Item 15 Custody

Wealth Oklahoma does not have custody of client's assets.

Item 16 Investment Discretion

Wealth Oklahoma has limited discretionary authority to determine what securities a client may hold and in what amount. This authority is granted in writing by the client for each account via the Raymond James & Associates Master Advisory Agreement. This authority does not allow us to take possession of client funds or securities.

Item 17 Voting Client Securities

Wealth Oklahoma does not vote proxies on behalf of clients. Clients will receive their proxy materials from the custodian or transfer agent. In the unlikely event that we receive such material, we will forward it to clients. Furthermore, we will not advise clients on how to vote their proxies.

Item 18 Financial Information

Wealth Oklahoma does not have custody of clients' assets. We do not solicit payments of \$1,200 per client or more than six (6) months in advance for services. We have not been subject to bankruptcy and know of no reason that our financial condition would be impaired in meeting our contractual obligations to clients.

Privacy Notice

Wealth Oklahoma is committed to protecting confidentiality of the information furnished to us by our clients. We are providing you with this information as required by Regulation S-P adopted by the Securities and Exchange Commission.

Information about you that we collect. We collect nonpublic personal information about you from information we receive from you on applications or other forms or through our Website and information about your transactions with us.

How we protect your confidential information. Wealth Oklahoma has policies that restrict access to nonpublic personal information about you to those employees who have need for that information to provide investment alternatives or services to you, and to employees who assist those who provide investment alternatives or services to you. We maintain physical, electronic, and procedural safeguards to protect your nonpublic personal information.

Our use of information about you. We share information about you with Raymond James & Associates (“RJA”), member NYSE/SIPC as the Custodian of all client accounts for everyday business purposes such as processing your transactions and maintaining your accounts. As required, we may also share information about you in response to court orders or reporting to credit bureaus. We do not share any of your personal information with RJA or any other company for their marketing purposes.

**Part 2B of Form ADV:
*Brochure Supplement – Jon Stolper***

Item 1 Cover Page

Jon Stolper
CRD no. 1273542
The Stolper Company, L.L.C.
dba Wealth Oklahoma
2021 S. Lewis Avenue, Suite 301
Tulsa, OK 74104
Phone: 918-745-6060
Fax: 918-745-6583
Website: www.wealthoklahoma.com
April 23, 2026

This brochure supplement provides information about Jon Stolper that supplements the Wealth Oklahoma brochure. You should have received a copy of that brochure. Please contact us at 918-745-6060 or info@wealthoklahoma.com if you did not receive Wealth Oklahoma’s brochure or if you have any questions about the contents of this supplement.

Additional information about Jon Stolper is available on the SEC’s website at www.adviserinfo.sec.gov.

Item 2

Educational Background and Business Experience

Jon Stolper (YOB: 1962) founded The Stolper Company L.L.C. in 2002, which began operating under the DBA Wealth Oklahoma in 2025. Mr. Stolper is the Chief Investment Officer and Portfolio Manager of Wealth Oklahoma. Mr. Stolper is a graduate of Oklahoma State University with a BS in Business Administration. He has over forty (40) years of experience in the securities industry with companies that include Merrill Lynch, Principal Financial Securities, and Raymond James.

Mr. Stolper currently holds the following licenses: Series 7 (General Securities Representative), Series 9/10 (General Securities Sales Supervisor), Series 63 (Uniform Securities Agent State Law), Series 65 (Uniform Investment Adviser Law) and Series 66 (Uniform Combined State Law). He also received credit for the SIE (Securities Industry Essentials Examination) on October 1, 2018. In order to obtain these licenses, a person must study and pass a rigorous examination for each license. To maintain these licenses, a person must complete their continuing education annually.

Item 3 Disciplinary Information

Mr. Stolper does not have any disciplinary history.

Item 4 Other Business Activities

Jon Stolper is a registered representative of Raymond James Financial Services, Inc., member FINRA/SIPC (“RJFS”), a wholly owned subsidiary of Raymond James Financial, Inc. The brokerage services provided by RJFS are separate from the advisory services provided by Wealth Oklahoma. In the capacity of a registered representative, Mr. Stolper has existing clients who maintain brokerage accounts with RJFS and for whom he may execute brokerage transactions. In addition, Mr. Stolper may recommend the brokerage services of RJFS to advisory clients of Wealth Oklahoma, and, as a registered representative of RJFS, may execute security transactions in those brokerage accounts. Mr. Stolper will receive separate and customary compensation when executing securities transactions in brokerage accounts as a registered representative at RJFS. This business model creates a conflict of interest,

giving Mr. Stolper an incentive to recommend investment products based on the compensation received, rather than on the client's needs. Mr. Stolper addresses this conflict of interest by offering both advisory accounts where he is paid a percentage of the assets under management and brokerage accounts where he is paid commissions and fees based on sales.

Mr. Stolper is also a licensed insurance agent with Raymond James Insurance Group (RJIG) and sells insurance and insurance-related products. The insurance services provided by Mr. Stolper are separate from the advisory services provided by Wealth Oklahoma. In his capacity as an insurance agent, Mr. Stolper has insurance clients for whom he purchases insurance and insurance-related products, and he may recommend and purchase insurance and insurance related products for Wealth Oklahoma's clients. Mr. Stolper will receive separate and customary compensation for acting as an insurance agent and purchasing insurance and insurance related products. This business model creates a conflict of interest, giving Mr. Stolper an incentive to recommend insurance and insurance-based products based on the compensation received, rather than on the client's needs. Mr. Stolper does not solicit any new insurance business; he acts as an insurance agent strictly in order to service a limited number of annuities purchased elsewhere by existing clients.

Mr. Stolper spends approximately 20% of his time acting in the capacity of a registered representative for RJFS and less than 1% of his time acting in the capacity of an insurance agent.

Item 5 Additional Compensation

Mr. Stolper does not have any sources of compensation other than those described in "*Other Business Activities*" section of this brochure.

Item 6 Supervision

As the principal owner of Wealth Oklahoma, Mr. Stolper supervises the activities of the individuals that work at Wealth Oklahoma. As previously mentioned in the "*Educational Background and Business Experience*" section, he has over forty (40) years of experience in the financial industry and holds multiple licenses. Any questions or concerns may be directed to him at 918-745-6060. However, as the CCO of Wealth Oklahoma, Ms.

Bruns supervises the activities of Mr. Stolper Any questions or concerns may be directed to her at 918-745-6060.

**Part 2B of Form ADV:
Brochure Supplement – Susan McDonald**

Item 1 Cover Page

Susan McDonald
CRD no. 5765402
The Stolper Company, L.L.C.
dba Wealth Oklahoma
2021 S. Lewis Avenue, Suite 301
Tulsa, OK 74104
Phone: 918-745-6060
Fax: 918-745-6583
Website: www.wealthoklahoma.com
January 1, 2025

This brochure supplement provides information about Susan McDonald that supplements the Wealth Oklahoma brochure. You should have received a copy of that brochure. Please contact us at 918-745-6060 or info@wealthoklahoma.com if you did not receive Wealth Oklahoma’s brochure or if you have any questions about the contents of this supplement.

Additional information about Susan McDonald is available on the SEC’s website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Susan McDonald (YOB: 1969) joined Stolper Asset Management, the predecessor to Wealth Oklahoma, in 2010. She currently serves as a Portfolio Manager and Research Director. Ms. McDonald is a graduate of Cambridge University with an MA in Natural Sciences and holds the Chartered Financial Analyst (“CFA”) designation.

Chartered Financial Analyst (CFA®) (09/2005)

PROFESSIONAL DESIGNATION DISCLOSURES:

The CFA® Charter is a globally recognized, graduate-level investment credential. Earning demonstrates a commitment to professional ethics and expertise with the broad range of skills needed for competitive careers in the investment profession.

To earn a CFA charter, one must have four years of qualified investment work experience, become a member of CFA Institute, pledge to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct on an annual basis, apply for membership to a local CFA member society, and complete the CFA Program.

CFA Program curriculum topics:

- Ethical and professional standards
- Quantitative methods
- Economics
- Financial reporting and analysis
- Corporate finance
- Equity investments
- Fixed income
- Derivatives
- Alternative investments
- Portfolio management and wealth planning

A commitment to professional ethics is at the core of CFA Institute.

CFA Institute members and CFA Program candidates are subject to professional conduct enrollment/admission criteria and must comply with the Code and Standards. Additionally, members must annually complete and sign a Professional Conduct Statement, disclosing any allegations of professional misconduct.

Item 3 Disciplinary Information

Ms. McDonald does not have any disciplinary history.

Item 4 Other Business Activities

Susan McDonald is an employee of Wealth Oklahoma. Her compensation consists of a salary and participation in an annual bonus pool. Ms. McDonald does not advise any clients and has no financial incentives arising from any specific client investments.

Item 5 Additional Compensation

Ms. McDonald does not have any other type of additional compensation.

Item 6 Supervision

As the principal owner of Wealth Oklahoma, Mr. Stolper supervises the activities of the individuals that work at Wealth Oklahoma, including Ms. McDonald.

**Part 2B of Form ADV:
Brochure Supplement – Saletha M. Fuller**

Item 1 Cover Page

Saletha M. Fuller
CRD no. 1891766
The Stolper Company, L.L.C.
dba Wealth Oklahoma
2021 S. Lewis Avenue, Suite 301
Tulsa, OK 74104
Phone: 918-745-6060
Fax: 918-745-6583
Website: www.wealthoklahoma.com
May 8, 2025

This brochure supplement provides information about Saletha M. Fuller that supplements the Wealth Oklahoma brochure. You should have received a copy of that brochure. Please contact us at 918-745-6060 or info@wealthoklahoma.com if you did not receive Wealth Oklahoma’s brochure or if you have any questions about the contents of this supplement.

Additional information about Saletha M. Fuller is available on the SEC’s website at www.adviserinfo.sec.gov.

Saletha M. Fuller (YOB: 1952) joined Wealth Oklahoma in 2025 and is an Investment Adviser Representative. Ms. Fuller is a graduate of Tulsa Community College with an AA in Business. She has twenty-five (25) years of experience in the securities industry with companies that include: Wealth Oklahoma as a Wealth Manager, Raymond James Financial Services as a Wealth Manager, Raymond James Financial Services Advisors Inc. as an Investment Adviser Representative, Investacorp Advisory Services as an Investment Adviser Representative, and Investacorp, Inc. as an Investment Executive.

Ms. Fuller currently holds the following licenses: Series 7 (General Securities Representative), Series 24 (General Securities Principal Examination), Series 63 (Uniform Securities Agent State Law), and Series 65 (Uniform Investment Adviser Law). She also received credit for the SIE (Securities Industry Essentials Examination) on October 1, 2018. In order to obtain these licenses, a person must study and pass a rigorous examination for each license. To maintain these licenses, a person must complete their continuing education annually.

Ms. Fuller also holds the following designation below.

CERTIFIED FINANCIAL PLANNER (“CFP®”) (2006)

PROFESSIONAL DESIGNATION DISCLOSURES:

I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER professional or a CFP® professional, and I may use these and CFP Board’s other certification marks (the “CFP Board Certification Marks”). CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold CFP® certification. You may find more information about 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 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 requirements 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 hours 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*.

Please refer directly to the website of the issuing organization for additional information about this credential.

Item 3 Disciplinary Information

Ms. Fuller does not have any disciplinary history.

Item 4 Other Business Activities

Saletha M. Fuller is a Wealth Manager of Raymond James Financial Services, Inc., member FINRA/SIPC (“RJFS”), a wholly owned subsidiary of Raymond James Financial, Inc. The brokerage services provided by RJFS are separate from the advisory services provided by Wealth Oklahoma. In the capacity of Wealth Manager, Ms. Fuller has existing clients who maintain brokerage accounts with RJFS and for whom she may execute brokerage transactions. In addition, Ms. Fuller may recommend the brokerage services of RJFS to advisory clients of Wealth Oklahoma, and, as a Wealth Manager of RJFS, may execute security transactions in those brokerage accounts. Ms. Fuller will receive separate and customary compensation when executing securities transactions in brokerage accounts as a registered representative at RJFS. This business model creates a conflict of interest, giving Ms. Fuller an incentive to recommend investment products based on the compensation received, rather than on the client’s needs. Ms. Fuller addresses this conflict of interest by offering both advisory accounts where she is paid a percentage of the assets under management and brokerage accounts where she is paid commissions and fees based on sales.

Ms. Fuller is also a licensed insurance agent with Raymond James Insurance Group (RJIG) and sells insurance and insurance-related products. The insurance services provided by Ms. Fuller are separate

from the advisory services provided by Wealth Oklahoma. In her capacity as an insurance agent, Ms. Fuller has insurance clients for whom she purchases insurance and insurance-related products, and she may recommend and purchase insurance and insurance-related products for Wealth Oklahoma's clients. Ms. Fuller will receive separate and customary compensation for acting as an insurance agent and purchasing insurance and insurance related products. This business model creates a conflict of interest, giving Ms. Fuller an incentive to recommend insurance and insurance-based products based on the compensation received, rather than on the client's needs. Ms. Fuller does not solicit any new insurance business; she acts as an insurance agent strictly in order to service a limited number of annuities purchased elsewhere by existing clients.

Ms. Fuller spends approximately 88% of her time acting in the capacity of a registered representative for RJFS and less than 1% of her time acting in the capacity of an insurance agent.

Item 5 Additional Compensation

Ms. Fuller does not have any sources of compensation other than those described in "*Other Business Activities*" section of this brochure.

Item 6 Supervision

As the principal owner of Wealth Oklahoma, Mr. Stolper supervises the activities of the individuals that work at Wealth Oklahoma, including Ms. Fuller.

**Part 2B of Form ADV:
Brochure Supplement – Allison B. Stolper**

Item 1 Cover Page

Allison B. Stolper
CRD no. 8080308
The Stolper Company, L.L.C.
dba Wealth Oklahoma
2021 S. Lewis Avenue, Suite 301
Tulsa, OK 74104
Phone: 918-745-6060
Fax: 918-745-6583
Website: www.wealthoklahoma.com
March 11, 2026

This brochure supplement provides information about Allison B. Stolper that supplements the Wealth Oklahoma brochure. You should have received a copy of that brochure. Please contact us at 918-745-6060 or info@wealthoklahoma.com if you did not receive Wealth Oklahoma’s brochure or if you have any questions about the contents of this supplement.

Additional information about Allison B. Stolper is available on the SEC’s website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Allison (Ally) B. Stolper (YOB: 1999) joined Wealth Oklahoma in 2025 and is a Wealth Manager. Ms. Stolper is a graduate of University of Oklahoma with a BBA in Finance. She joined Wealth Oklahoma in July 2025 as a Wealth Manager and is also a Registered Representative with Raymond James Financial Services, Inc. Prior to her current roles, she was employed by BOK Financial in Tulsa, Oklahoma, where she served as an Investment Management Associate (2023-2025), Client Account Manager (2023), and Accelerated Career Track Associate (2021-2023).

Ms. Stolper currently holds the following licenses: SIE (Securities Industry Essentials Examination), Series 7 (General Securities Representative) and Series 66 (Uniform Combined State Law). In order to obtain these licenses, a person must study and pass a rigorous examination for each license. To maintain these licenses, a person must complete their continuing education annually.

Item 3 Disciplinary Information

Ms. Stolper does not have any disciplinary history.

Item 4 Other Business Activities

Ally B. Stolper is a registered representative of Raymond James Financial Services, Inc., member FINRA/SIPC (“RJFS”), a wholly owned subsidiary of Raymond James Financial, Inc. The brokerage services provided by RJFS are separate from the advisory services provided by Wealth Oklahoma. In the capacity of a registered representative, Ms. Stolper has existing clients who maintain brokerage accounts with RJFS and for whom she may execute brokerage transactions. In addition, Ms. Stolper may recommend the brokerage services of RJFS to advisory clients of Wealth Oklahoma, and, as a registered representative of RJFS, may execute security transactions in those brokerage accounts. Ms. Stolper will receive separate and customary compensation when executing securities transactions in brokerage accounts as a registered representative at RJFS. This business model creates a conflict of interest, giving Ms. Stolper an incentive to recommend investment products based on the compensation received, rather than on the client’s needs. Ms. Stolper addresses this conflict of interest by offering both advisory

accounts where she is paid a percentage of the assets under management and brokerage accounts where she is paid commissions and fees based on sales.

Ms. Stolper is also a licensed insurance agent with Raymond James Insurance Group (RJIG) and sells insurance and insurance-related products. The insurance services provided by Ms. Stolper are separate from the advisory services provided by Wealth Oklahoma. In her capacity as an insurance agent, Ms. Stolper has insurance clients for whom she purchases insurance and insurance-related products, and she may recommend and purchase insurance and insurance related products for Wealth Oklahoma's clients. Ms. Stolper will receive separate and customary compensation for acting as an insurance agent and purchasing insurance and insurance related products. This business model creates a conflict of interest, giving Ms. Stolper an incentive to recommend insurance and insurance-based products based on the compensation received, rather than on the client's needs. Ms. Stolper does not solicit any new insurance business; she acts as an insurance agent strictly in order to service a limited number of annuities purchased elsewhere by existing clients.

Ms. Stolper spends approximately 70% of her time acting in the capacity of a registered representative for RJFS and less than 1% of her time acting in the capacity of an insurance agent.

Item 5 Additional Compensation

Ms. Stolper does not have any sources of compensation other than those described in "Other Business Activities" section of this brochure.

Item 6 Supervision

As the principal owner of Wealth Oklahoma, Mr. Stolper supervises the activities of the individuals that work at Wealth Oklahoma, including Ms. Stolper.

