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## **March 2025 FORM ADV PART 2A BROCHURE**

Item 1. This Brochure provides information about the qualifications and business practices of Eagle Wealth Management, LLC. If you have any questions about the contents of this Brochure, please contact us at 208.9632525. The information in this Brochure has not been approved or verified by the United States Securities and Exchange Commission or by any state securities authority. Additional information about Eagle Wealth Management, LLC is also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov). The searchable IARD/CRD number for Eagle Wealth Management, LLC is 152934. Eagle Wealth Management, LLC is a registered investment adviser. Registration with the United States Securities and Exchange Commission or any state securities authority does not imply a certain level of skill or training. 2

Item 2. Summary of Material Changes Form ADV Part 2 requires registered investment advisers to amend their brochure when information becomes materially inaccurate. If there are any material changes to an adviser's disclosure brochure, the adviser is required to notify you and provide you with a description of the material changes. Since our last annual updating amendment dated March 2025, we have no material changes to report.

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Item 4 Advisory Business Description of Services and Fees Eagle Wealth Management, LLC is a registered investment adviser based in Denver, North Carolina. We are organized as a limited liability company under the laws of the State of Idaho. We have been providing investment advisory services since 2010. James Scott is our Managing Member and owner. Currently, we offer investment management services to our clients and prospective clients. The following paragraphs describe our services and fees. Please refer to the description of each investment advisory service listed below for information on how we tailor our advisory services to your individual needs. As used in this Brochure, the words "we", "our" and "us" refer to Eagle Wealth Management, LLC and the words "you", "your" and "client" refer to you as either a client or prospective client of our firm. Also, you may see the term Associated Person throughout this Brochure. As used in this Brochure, our Associated Persons are our firm's officers, employees, and all individuals providing investment advice on behalf of our firm. The use of these terms is not intended to imply that there is more than one individual associated with this firm.

**Investment Management Services** We offer discretionary continuous investment management services where the investment advice provided is tailored to meet your individual financial needs and investment objectives. We offer an initial consultation in which pertinent information about your personal and financial circumstances and objectives is collected, and the scope of the engagement is determined. Where we enter into discretionary arrangements with you, we will be granted discretion and authority to manage your account subject to any written guidelines that you may provide. Accordingly, we are authorized to perform various investment functions, on your behalf and at your expense, without further approval from you. Such functions may include

the determination of securities and the amount of securities to be purchased and sold. Once your portfolio is constructed, we will provide ongoing supervision and rebalancing as changes in market conditions and your individual circumstances may require. Fees are negotiable but shall be no greater than 1% of the value of assets under management. Our annual fee for investment management services is billed quarterly in advance based on the asset value on the last business day of the previous quarter. Our fees will be assessed pro rata in the event the investment management agreement is executed at any time other than the first day of a calendar quarter. Our investment management fees may be negotiable depending on factors such as the amount of assets under management, range of investments, and complexity of your financial circumstances, among others. We require that payment of management fees be made by the custodian holding your funds and securities provided that the following requirements are met:

- You provide written authorization permitting the fees to be paid directly from your account held by the qualified custodian. We do not have access to your funds for payment of fees without your consent in writing.
- The custodian agrees to provide you and our firm with a statement, at least quarterly, indicating all amounts dispersed from the account including the amount of the advisory fee paid directly to us. 5 You may terminate the portfolio management agreement upon written notice to our firm. You will incur a pro rata charge for services rendered prior to the termination of the portfolio management agreement, which means you will incur advisory fees only in proportion to the number of days in the quarter for which you are a client. If you have pre-paid advisory fees that we have not yet earned, you will receive a prorated refund of those fees.

**Types of Investments** We may advise you on any type of investment that we deem appropriate based on your stated goals and objectives. We may also provide advice on any type of investment held in your portfolio at the inception of our advisory relationship. You may request that we refrain from investing in

particular securities or certain types of securities. You must provide these restrictions to our firm in writing.

**Assets Under Management** As of December 31, 2024, we provide continuous management services for less than \$15 million in client assets on a discretionary basis, and \$0 in client assets on a non-discretionary basis.

**Item 5 Fees and Compensation** Please refer to the "Advisory Business" section in this Brochure for information on our advisory fees, fee deduction arrangements, and refund policy according to each service we offer.

**Additional Fees and Expenses** As part of our investment advisory services to you, we may invest, or recommend that you invest, in mutual funds and exchange traded funds. The fees that you pay to our firm for investment advisory services are separate and distinct from the fees and expenses charged by mutual funds or exchange traded funds (described in each fund's prospectus) to their shareholders. These fees will generally include a management fee and other fund expenses. You will also incur transaction charges and/or brokerage fees when purchasing or selling securities. These charges and fees are typically imposed by the broker-dealer or custodian through whom your account transactions are executed. We do not share in any portion of the brokerage fees/transaction charges imposed by the broker-dealer or custodian. To fully understand the total cost you will incur, you should review all the fees charged by mutual funds, exchange traded funds, our firm, and others. For information on our brokerage practices, please refer to the "Brokerage Practices" section of this Brochure.

**Item 6 Performance-Based Fees and Side-By-Side Management** We do not accept performance-based fees or participate in side-by-side management. 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. Performance-based fees are fees that are based on a share of capital gains or capital appreciation of a client's account. Our fees are calculated as described in the Advisory

Business section above, and are not charged on the basis of a share of capital gains. up

Item 7 Types of Clients We offer investment advisory services to individuals, pension and profit sharing plans, trusts, estates, charitable organizations, corporations, and other business entities. 6 While we retain the right to accept or decline management of any account for any reason, including the amount of assets to be managed, in general, we do not require a minimum dollar amount to open and maintain an advisory account; however, we have the right to terminate your Account if it falls below a minimum size which, in our sole opinion, is too small to effectively manage.

Item 8 Methods of Analysis, Investment Strategies and Risk of Loss Our Methods of Analysis and Investment Strategies We may use one or more of the following methods of analysis or investment strategies when providing investment advice to you:

- Charting Analysis - involves the gathering and processing of price and volume information for a particular security. This price and volume information is analyzed using mathematical equations. The resulting data is then applied to graphing charts, which is used to predict future price movements based on price patterns and trends.
- Fundamental Analysis - involves analyzing individual companies and their industry groups, such as a company's financial statements, details regarding the company's product line, the experience and expertise of the company's management, and the outlook for the company's industry. The resulting data is used to measure the true value of the company's stock compared to the current market value.
- Technical Analysis - involves studying past price patterns and trends in the financial markets to predict the direction of both the overall market and specific stocks.
- Cyclical Analysis - a type of technical analysis that involves evaluating recurring price patterns and trends.
- Long Term Purchases - securities

purchased with the expectation that the value of those securities will grow over a relatively long period of time, generally greater than one year. • Short Term Purchases - securities purchased with the expectation that they will be sold within a relatively short period of time, generally less than one year, to take advantage of the securities' short-term price fluctuations. Our investment strategies and advice may vary depending upon each client's specific financial situation. As such, we determine investments and allocations based upon your predefined objectives, risk tolerance, time horizon, financial horizon, financial information, liquidity needs, and other various suitability factors. Your restrictions and guidelines may affect the composition of your portfolio. Charting and Technical Analysis - The risk of market timing based on technical analysis is that charts may not accurately predict future price movements. Current prices of securities may reflect all information known about the security and day to day changes in market prices of securities may follow random patterns and may not be predictable with any reliable degree of accuracy. Fundamental Analysis - The risk of fundamental analysis is that information obtained may be incorrect and the analysis may not provide an accurate estimate of earnings, which may be the basis for a stock's value. If securities prices adjust rapidly to new information, utilizing fundamental analysis may not result in favorable performance. Cyclical Analysis - Economic/business cycles may not be predictable and may have many fluctuations between long term expansions and contractions. The lengths of economic cycles may be difficult to predict with accuracy and therefore the risk of cyclical analysis is the difficulty in predicting economic trends and consequently the changing value of securities that would be affected by these changing trends.

7 Our strategies and investments may have unique and significant tax implications. However, unless we specifically agree otherwise, and in writing, tax efficiency is not our primary consideration in the management of your assets. Regardless of your account size or any other factors, we strongly recommend that you continuously consult with a tax professional prior to and throughout the investing of your assets. Moreover, as a result of revised IRS

regulations, custodians and broker-dealers will begin reporting the cost basis of equities acquired in client accounts on or after January 1, 2011. Your custodian will default to the FIFO (First-In First-Out) accounting method for calculating the cost basis of your investments. You are responsible for contacting your tax advisor to determine if this accounting method is the right choice for you. If your tax advisor believes another accounting method is more advantageous, please provide written notice to our firm immediately and we will alert your account custodian of your individually selected accounting method. Please note that decisions about cost basis accounting methods will need to be made before trades settle, as the cost basis method cannot be changed after settlement. Risk of Loss Investing in securities involves risk of loss that you should be prepared to bear. We do not represent or guarantee that our services or methods of analysis can or will predict future results, successfully identify market tops or bottoms, or insulate clients from losses due to market corrections or declines. We cannot offer any guarantees or promises that your financial goals and objectives will be met. Past performance is in no way an indication of future performance.

#### Recommendation of Particular Types of Securities

As disclosed under the "Advisory Business" section in this Brochure, we do not necessarily recommend one particular type of security over another since each client has different needs and different tolerance for risk. Each type of security has its own unique set of risks associated with it and it would not be possible to list here all of the specific risks of every type of investment. Even within the same type of investment, risks can vary widely. However, in very general terms, the higher the anticipated return of an investment, the higher the risk of loss associated with it.

#### Item 9 Disciplinary Information

Eagle Wealth Management, LLC has been registered and providing investment advisory services since 2010. Neither our firm nor any of our Associated Persons has any reportable disciplinary information.

#### Item 10 Other Financial Industry Activities and Affiliations

We have not provided information on other financial industry activities and affiliations because we do not have any relationship or arrangement that is material to our advisory business or to our clients with any other types of entities listed below. 1. broker-dealer, municipal securities dealer, or government securities dealer or broker 2. investment company or other pooled investment vehicle (including a mutual fund, closed-end investment company, unit investment trust, private investment company or "hedge fund," and offshore fund) 3. other investment adviser or financial planner 4. futures commission merchant, commodity pool operator, or commodity trading advisor 5. banking or thrift institution 6. accountant or accounting firm 7. lawyer or law firm 8. insurance company or agency 9. pension consultant 10. real estate broker or dealer 11. sponsor or syndicator of limited partnerships

Item 11 Code of Ethics, Participation or Interest in Client Transactions and Personal Trading Description of Our Code of Ethics We strive to comply with applicable laws and regulations governing our practices. Therefore, our Code of Ethics includes guidelines for professional standards of conduct for our Associated Persons. Our goal is to protect your interests at all times and to demonstrate our commitment to our fiduciary duties of honesty, good faith, and fair dealing with you. All of our Associated Persons are expected to adhere strictly to these guidelines. Persons associated with our firm are also required to report any violations of our Code of Ethics. Additionally, we maintain and enforce written policies reasonably designed to prevent the misuse or dissemination of material, non-public information about you or your account holdings by persons associated with our firm. Clients or prospective clients may obtain a copy of our Code of Ethics by contacting us at the telephone number on the cover page of this Brochure. Participation or Interest in Client Transactions Neither our firm nor any of our Associated Persons has any material financial interest in client transactions beyond the provision of investment advisory services as disclosed in this Brochure. Personal Trading Practices It is the policy of our firm to not personally buy or sell the same securities that we recommend to you or securities in which you are already invested. A conflict of interest would exist in the situation where we have the



ability to trade ahead of you and potentially receive more favorable prices than you will receive. To eliminate this conflict of interest, it is our policy to not personally purchase or sell the same securities we recommend to you and other clients.

#### Item 12 Brokerage Practices Brokerage Recommendations

For clients engaging our firm for portfolio management services, clients must open one or more custodian accounts in their own name at an independent custodian. While you are free to choose any broker-dealer/custodian or other service provider, we typically require that you establish an account with a brokerage firm with which we have an existing relationship. In recommending a broker dealer/custodian we will endeavor to select those brokers or dealers that will provide quality services at reasonable fees. The reasonableness of such fees is based on several factors, including the broker's ability to provide professional services, competitive commission rates, volume discounts, execution price negotiations, the custodian's reputation, execution capabilities, and responsiveness to our clients.

All firms we recommend for these services are independent and unaffiliated with our firm. It may be the case that the recommended broker charges higher fees or commission rates than another broker charges. You may utilize the broker/dealer of your choice and have no obligation to purchase or sell securities through such broker as we may recommend. The research products and services that we may receive from brokerage firms

may include financial publications, information about particular companies and industries, and other products or services that provide lawful and appropriate assistance to us in the performance of our investment decision-making responsibilities. Such research products and services are provided to all investment advisers and are not considered to be paid for with soft dollars. However, the commissions charged by a particular broker for a particular transaction, or set of transactions, may be greater than the amounts another broker who did not provide research services or products might charge.

## Brokerage for Client Referrals

We may receive client referrals from outside custodians or managers.

## Item 13 Review of Accounts

Account reviews are conducted at least quarterly. Reviews are conducted for the purpose of evaluating, reporting, and implementing your investment objectives. Your account may be reviewed more often depending on market conditions. The assets may be reallocated to keep the portfolio allocation consistent with your investment objectives. Accounts are reviewed by James Scott, Managing Member of our firm. For investment management accounts, we may provide you with performance reports for informational purposes only. These reports are not to be used as a substitute for any reports distributed by any mutual fund company that you may have an investment in nor any monthly or annual statements sent by the broker dealer or other custodian that maintains custody of your account.

## Item 14 Client Referrals and Other Compensation

We do not receive any compensation from any third party in connection with providing investment advice to you nor do we compensate any individual or firm for client referrals.

## Item 15 Custody

As paying agent for our firm, your independent custodian will directly debit your account(s) for the payment of our advisory fees. This ability to deduct our advisory fees from your accounts causes our firm to exercise limited custody over your funds or securities. We do not have physical custody of any of your funds and/or securities. Your funds and securities will be held with a bank, broker-dealer, or other independent, qualified custodian. You will receive account statements from the independent, qualified custodian(s) holding your funds and securities at least quarterly. The account statements from your custodian(s) will indicate the amount of our advisory fees deducted from

your account(s) each billing period. You should carefully review account statements for accuracy. If you have a question regarding your account statement or if you did not receive a statement from your custodian, please contact us directly at the telephone number on the cover page of this Brochure.

Item 16 Investment Discretion Before we can buy or sell securities on your behalf, you must first sign our discretionary management agreement and/or trading authorization forms. You may grant our firm discretion over the selection and amount of securities to be purchased or sold for your account(s) without obtaining your consent or approval prior to each transaction. You may specify investment objectives, guidelines, and/or impose certain conditions or investment parameters for your account(s). For example, you may specify that the investment in any particular stock or industry should not exceed specified percentages of the value of the portfolio and/or restrictions or prohibitions of transactions in the securities of a specific industry or security. Please refer to the "Advisory Business" section in this Brochure for more information on our discretionary management services. If you enter into non-discretionary arrangements with our firm, we will obtain your approval prior to the execution of any transactions for your account(s). You have an unrestricted right to decline to implement any advice provided by our firm on a non-discretionary basis.

#### 11 Item 17 Voting Client Securities Proxy Voting

We will not vote proxies on behalf of your advisory accounts. At your request, we may offer you advice regarding corporate actions and the exercise of your proxy voting rights. If you own shares of applicable securities, you are responsible for exercising your right to vote as a shareholder. In most cases, you will receive proxy materials directly from the account custodian. However, in the event we were to receive any written or electronic proxy materials, we would forward them directly to you by mail, unless you have authorized our firm to contact you by electronic mail, in which case, we would forward any electronic solicitation to vote proxies.

## Item 18 Financial Information

We are not required to provide financial information to our clients because we do not:

- require the prepayment of more than \$500 in fees and six or more months in advance, or
- take custody of client funds or securities, or
- have a financial condition that is reasonably likely to impair our ability to meet our commitments to you.

## Item 19 Requirements for State Registered Advisers

Neither our firm, nor any of our Associated Persons are compensated for advisory services with performance-based fees. Please refer to the "Performance-Based Fees and Side-By-Side Management" section above for additional information on this topic. Neither our firm, nor any of our Associated Persons have any reportable arbitration claims, civil, selfregulatory organization proceeding or administrative proceeding. Neither our firm, nor any of our Associated Persons have a material relationship or arrangement with any issuer of securities. Refer to the Part(s) 2B for background information about management personnel and those giving advice on behalf of our firm.

## Item 20 Additional Information

### Your Privacy

We view protecting your private information as a top priority. Pursuant to applicable privacy requirements, we have instituted policies and procedures to ensure that we keep your personal information private and secure. We do not disclose any nonpublic personal information about you to any nonaffiliated third parties, except as permitted by law. In the course of servicing your account, we may share some information with our service providers, such as transfer agents, custodians, broker-dealers, accountants, consultants, and attorneys. We restrict internal access to nonpublic personal

information about you to employees, who need that information in order to provide products or services to you. We maintain physical and procedural safeguards that comply with regulatory standards to guard your nonpublic personal information and to 12 ensure our integrity and confidentiality. We will not sell information about you or your accounts to anyone. We do not share your information unless it is required to process a transaction, at your request, or required by law. You will receive a copy of our privacy notice prior to or at the time you sign an advisory agreement with our firm. Thereafter, we will deliver a copy of the current privacy policy notice to you on an annual basis. Please contact our main office at the telephone number on the cover page of this Brochure if you have any questions regarding this policy.

**Trade Errors** In the event a trading error occurs in your account, our policy is to restore your account to the position it should have been in had the trading error not occurred. Depending on the circumstances, corrective actions may include canceling the trade, adjusting an allocation, and/or reimbursing the account. If a trade error results in a profit, you will keep the profit.

**Class Action Lawsuits** We do not determine if securities held by you are the subject of a class action lawsuit or whether you are eligible to participate in class action settlements or litigation nor do we initiate or participate in litigation to recover damages on your behalf for injuries as a result of actions, misconduct, or negligence by issuers of securities held by you.

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#### March 2025 FORM ADV PART 2B BROCHURE SUPPLEMENT

This brochure supplement provides information about James H. Scott that supplements the Eagle Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact us at (208) 963-2525 if you did not receive Eagle Wealth Management, LLC's brochure or if you have any questions about the contents of this supplement.

**Item 1 Requirements for State-Registered Advisers** James Scott filed a personal bankruptcy petition under Chapter 7 on 10/16/05. Said petition was fully resolved and discharged on 1/27/06. The circumstances surrounding the filing were entirely related to the failure of a private business enterprise in which Mr. Scott had invested. Said business engaged in the retail trade and was entirely separate from and had no relationship whatsoever to Mr. Scott's investment advisory activities. Mr. Scott also filed a personal bankruptcy petition under Chapter 7 on 2/14/18. Said petition was discharged on 8/28/18. The circumstances surrounding the filing are related to a then unsatisfied judgment in the amount of \$228,692 resulting from a civil suit where Mr. Scott initially filed suit for violation of CC&R rules in the subdivision in which he lived. The Defendants counterclaimed and were awarded a judgment which Mr. Scott felt was entirely inappropriate. He immediately filed a Chapter 7 Petition. Subsequently, in an Adversary Proceeding, Mr. Scott emerged as the prevailing party and the judgment entered against him in the state court action was VOIDED in its entirety and Mr. Scott was not required to pay any amounts whatsoever to the Defendant in the underlying state court action.

**Item 2 Educational Background and Business Experience** James Hurd Scott  
Year of Birth: 1944 Formal Education after High School: • Eastern Michigan University, attended from 1963 to 1964. Business Background for the Previous Five Years:

- Eagle Wealth Management, LLC, Managing Member/Investment Adviser Representative, 01/2010 to Present.

**Item 3 Disciplinary Information** Mr. Scott does not have any reportable disciplinary disclosure.

**Item 4 Other Business Activities** James H. Scott does not receive any additional compensation for providing advisory services beyond the fee based compensation he receives through Eagle Wealth Management, LLC. Mr. Scott

is the Managing Member of JamPam Enterprises located in Denver NC which is not investment related. He provides general supervision of the company which is involved in music publishing.

Item 5 Additional Compensation Please refer to the Other Business Activities section above for disclosures on Mr. Scott's receipt of additional compensation as a result of his other activities. Also, please refer to the Fees and Compensation section and the Client Referrals and Other Compensation section of Eagle Wealth Management, LLC's firm brochure for additional disclosures on this topic.

Item 6 Supervision As Managing Member and an Investment Adviser Representative of Eagle Wealth Management, LLC, James H. Scott is not supervised by other persons.