

Item 1 – Cover Page



A California Registered Investment Adviser

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Henry Steven Reed
Lead Planning Consultant

Form ADV Part 2B
Brochure Supplement
August 15, 2025

This Brochure Supplement provides information about Henry Reed that supplements the PWJohnson Wealth and Legacy, LLC Brochure. You should have received a copy of that Brochure. Please contact Peter Johnson at (408) 747-1222 if you did not receive Firm's ADV Part 2A Brochure or if you have any questions about the contents of this supplement. Registration does not imply any certain level of skill or training.

Additional information about Henry Reed is available on the Securities and Exchange Commission's (SEC) website at www.adviserinfo.sec.gov.

Item 2: Educational Background and Business Experience

Born: 1994 / CRD # 7175369

Formal Education after High School

Bachelor of Music, San Jose State University, San Jose, CA

Business Background

PWJohnson Wealth and Legacy, LLC - 07/2025 to Present
Los Altos, CA
Lead Planning Consultant

Sabbatical - 02/2025 to 06/2025

Griffin Black, LLC (fka Griffin Black, Inc.) - 08/2024 to 01/2025
Redwood City, CA
Associate Wealth Advisor

Silicon Valley Capital Partners - 10/2023 to 05/2024
San Jose, CA
Client Services Manager

AssetMark Financial, Inc. - 01/2021 to 10/2023
Mountain View, CA
New Business Case Manager

PWJohnson Wealth and Legacy, LLC - 09/2020 to 01/2021
Los Altos, CA
Consultant

Charles Schwab - 07/2020 to 09/2020
Los Gatos, CA
Client Relationship Specialist

PWJohnson Wealth and Legacy - 10/2018 to 07/2020
Los Altos, CA
Associate Financial Planner

OneAscent Financial Solutions, LLC - 12/2018 to 06/2020
Birmingham, AL
Associate Financial Planner/Investment Adviser Representative

Item 3: Disciplinary Information

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. No information is applicable to this section. There are no reportable criminal or civil actions, administrative enforcement proceedings, self-regulatory organization enforcement proceedings or any other proceedings applicable to Mr. Reed.

Item 4: Other Business Activities

Mr. Reed is not actively engaged in another *investment-related* business or occupation; he is not registered nor has an application pending to register as a registered representative of a broker/dealer or associated person of a futures commission merchant, commodity pool operator, or commodity trading advisor. Therefore, he does not receive commissions, bonuses or other compensation based on the sale of securities or other investment products, including that as a registered representative of a broker/dealer, and including distribution or service ("trail") fees from the sale of mutual funds.

Item 5: Additional Compensation

Mr. Reed is not compensated for advisory services involving performance-based fees. He is not a senior executive of or insider to an issuer of a security. Our firm also prohibits employees from accepting or receiving additional economic benefits, such as sales awards or other prizes, for providing advisory services to its clients.

Item 6: Supervision

Peter Johnson serves as CCO of PWJohnson Wealth and Legacy, LLC and is responsible for supervision. He may be contacted at the number on the cover page of this brochure.

The business and disciplinary history, if any, of an investment advisory firm and its representatives may also be obtained by contacting the California Securities Department at (800) 628-7937.

Item 7: Requirements for State-Registered Advisors

There have been neither arbitration awards nor any sanctions or other matters where Mr. Reed had been found liable in any civil, self-regulatory or administrative proceeding. Further, Mr. Reed has not been the subject of a bankruptcy petition.