Summary of Material Changes to
Form ADV Part 2A Retirement Plan Services Disclosure Brochure

for

MASCAGNI WEALTH MANAGEMENT

205 E. Main Street
Clinton, MS 39056

601-925-8099

www.mascagniwealth.com

March 19, 2024

MASCAGNI WEALTH MANAGEMENT is a registered investment adviser. Registration of an Investment Adviser does not imply any level of skill or training. The oral and written communications of an Adviser provide you with information about which you determine to hire or retain an Adviser.

We initially provide you with a copy of our Retirement Plan Services Disclosure Brochure when we enter into an agreement with you. On an annual basis, we will provide you with a Summary of Material Changes within 120 days of our December 31 fiscal year end. In the alternative, we may choose to provide you with a complete copy of our updated Retirement Plan Services Disclosure Brochure.

Since our last annual update of March 23, 2023, we have made the following material changes:

- In consideration of the acquisition of TD Ameritrade, Inc. ("TD Ameritrade") by Charles Schwab & Co., Inc. ("Schwab") completed in September 2024, references to TD Ameritrade have been removed from Item 12.

As of December 31, 2023, we managed client assets totaling $313,445,079 on a discretionary basis. In addition, we provided non-discretionary investment consulting and education to qualified retirement plans representing $36,531,715 in retirement plan assets.

You may request a complete copy of our current Retirement Plan Services Disclosure Brochure at any time without charge by contacting Julie Sanders, Vice President of Client Services and Operations, at 601-925-8099 and/or julie@mascagni.com.

Additional information about us, including information about any affiliated persons who are registered as our investment adviser representatives, is available on the SEC's website at www.adviserinfo.sec.gov.