

Blake M. Street

Warren Street Wealth Advisors, LLC

200 Spectrum Center Drive
Suite 300 Irvine, CA 92618

Telephone: 714-876-6200
Facsimile: 714-462-1252

August 13, 2024

**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Blake M. Street that supplements the Warren Street Wealth Advisors, LLC brochure. You should have received a copy of that brochure. Contact us at 714-876-6200 if you did not receive Warren Street Wealth Advisors, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Blake M. Street is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Blake M. Street

Year of Birth: 1986

Formal Education After High School:

- California State University - Fullerton, BS, Business Administration, 2009

Business Background:

- Warren Street Wealth Advisors, LLC; Managing Member, and Chief Compliance Officer; 10/2014 - Present
- TBS Agency, Inc., Insurance Agent, 10/2011 – 01/2020
- Cambridge Investment Research, Inc., Registered Representative, 10/2011 - 02/2015
- Cambridge Investment Research Advisors, Inc., Investment Adviser Representative, 10/2011 - 02/2015
- LPL Financial, LLC d/b/a La Pointe Private Client Group, RR, IAR and Ins. Agent, 5/2010 - 9/2011
- LPL Financial, LLC d/b/a La Pointe Private Client Group, Paraplanner, 1/2009 - 5/2010

Certifications: **CFP®**

The **CERTIFIED FINANCIAL PLANNER, CFP®** and federally registered CFP® (with flame design) marks (collectively, the "CFP® marks") are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP® Board").

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients. Currently, more than 63,000 individuals have obtained CFP® certification in the United States. To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- Education - Complete an advanced college-level course of study addressing the financial planning subject areas that CFP® Board's studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a Bachelor's Degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP® Board's financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;
- Examination - Pass the comprehensive CFP® Certification Examination. The examination, administered in 10 hours over a two-day period, includes case studies and client scenarios designed to test one's ability to correctly diagnose financial planning issues and apply one's knowledge of financial planning to real world circumstances;
- Experience - Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
- Ethics - Agree to be bound by CFP® Board's *Standards of Professional Conduct*, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- Continuing Education - Complete 30 hours of continuing education hours every two years, including two hours on the *Code of Ethics* and other parts of the *Standards of Professional Conduct*, to maintain competence and keep up with developments in the financial planning field; and
- Ethics - Renew an agreement to be bound by the *Standards of Professional Conduct*. The Standards prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP® Board's enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

Blake M. Street has a CFP® designation since 2011.

Item 3 Disciplinary Information

Blake M. Street does not have any reportable disciplinary disclosure.

Item 4 Other Business Activities

Blake M. Street is a licensed insurance agent. From time to time, he will offer clients advice or products from those activities. Clients should be aware that these services pay a commission and involve a conflict of interest, as commissionable products conflict with the fiduciary duties of a registered investment adviser. Warren Street Wealth Advisors, LLC always acts in the best interest of the client, including the sale of commissionable products to advisory clients. Clients always have the right to decide whether or not to utilize the services of any representative of Warren Street Wealth Advisors, LLC in such individual's outside capacities.

Blake M. Street is also a licensed real estate broker and, in that capacity, may earn compensation for providing real estate sales. Mr. Street devotes 5% of his professional time as a real estate broker and compensation for the same to Mr. Street is separate and in addition to any fees that we earn for providing advisory services to you. If you request services of a real estate professional or that of a mortgage loan, we may refer you to Mr. Street; however, you are under no obligation to engage Mr. Street for the same and may obtain comparable services and/or lower fees through other real estate firms.

Blake M. Street owns season tickets for the Los Angeles Lakers basketball team. Mr. Street may engage in the sale of these tickets for compensation to individuals but not clients of Warren Street Wealth Advisors, LLC. Such compensation to Mr. Street is separate and in addition to any fees Warren Street Wealth Advisors, LLC earns for providing advisory services to you. Mr. Street's sale of sports entertainment tickets does not create a conflict of interest to his provision of advisory services through Warren Street Wealth Advisors, LLC.

Blake Street is the Co-owner of Street I LLC, a F45 Training Fitness franchise where Blake Street offers strategic guidance and management consulting.

Item 5 Additional Compensation

Refer to the *Other Business Activities* section above for disclosures on Mr. Street's receipt of additional

compensation as a result of his other business activities.

Also, refer to the *Fees and Compensation, Client Referrals and Other Compensation and Other Financial Industry Activities and Affiliations* section(s) of Warren Street Wealth Advisors, LLC's firm brochure for additional disclosures on this topic.

Item 6 Supervision

In the supervision of our associated persons, advice provided is based on the restrictions set by Warren Street Wealth Advisors, LLC, and by internal decisions as to the types of investments that may be included in client portfolios. We conduct periodic reviews of client holdings and documented suitability information to provide reasonable assurance that the advice provided remains aligned with each client's stated investment objectives and with our internal guidelines.

My supervisor is: Veronica Cabral. - Chief Compliance Officer.

Supervisor phone number: 714-876-6200