

This brochure supplement provides information about Alexander Michael Wymore that supplements the Koala Financial brochure. You should have received a copy of that brochure. Please contact Alexander Michael Wymore if you did not receive Koala Financial's brochure or if you have any questions about the contents of this supplement.

Additional information about Alexander Michael Wymore is also available on the SEC's website at www.adviserinfo.sec.gov.

Koala Financial

Form ADV Part 2B – Individual Disclosure Brochure

for

Alexander Michael Wymore

Personal CRD Number: 6376139

Investment Adviser Representative

Koala Financial
5012 CENTRAL AVENUE SUITE J
BONITA, CA 91902
(619) 475-5542
alex@koala.cpa

UPDATED: 06/02/2026

Item 2: Educational Background and Business Experience

Name: Alexander Michael Wymore **Born:** 1977

Educational Background and Professional Designations:

Education:

Master of Arts Procurement, Webster - 2014

Business Background:

04/2025 - Present Investment Adviser Representative
Koala Financial

07/2014 - Present Owner
Koala Financial

09/2025 - 05/2026 Registered Rep and Investment Adviser Rep
Cetera

11/2022 - 09/2025 Registered Rep and Investment Adviser Rep
Avantax

Item 3: Disciplinary Information

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

Item 4: Other Business Activities

Alexander Michael Wymore is an owner, principal, and accountant with Koala Financial. From time to time, he will offer clients advice or products from this activity. Koala Financial always acts in the best interest of the client. Clients are in no way required to utilize the services of any representative of Koala Financial in their capacity as an accountant. Alexander Michael Wymore does not have signatory authority and cannot sign or authorize transactions on any client accounts.

Alexander Michael Wymore is an owner and licensed insurance agent with Koala Insurance Solutions, LLC. This activity creates a conflict of interest since there is an incentive to recommend insurance products based on commissions or other benefits received from the insurance company, rather than on the client's needs. Additionally, the offer and sale of insurance products by supervised persons of Koala Financial are not made in their capacity as a fiduciary, and products are limited to only those offered by certain insurance providers. Koala Financial addresses this conflict of interest by requiring its supervised persons to act in the best interest of the client at all times, including when acting as an insurance agent. Koala Financial periodically reviews recommendations by its supervised persons to assess whether they are based on an objective evaluation of each client's risk profile and investment objectives rather than on the receipt of any commissions or other benefits. Koala Financial will disclose in advance how it or its supervised persons are compensated and will disclose conflicts of interest involving any advice or service provided. At no time will there be tying between business practices and/or services (a condition where a client or prospective client would be required to accept one product or service conditioned upon the selection of a second, distinctive tied product or service). No client is ever under any obligation to purchase any insurance product. Insurance products recommended by Koala Financial's supervised persons may also be available from other providers on more favorable terms, and clients can purchase insurance products recommended through other unaffiliated insurance agencies.

Item 5: Additional Compensation

Alexander Michael Wymore does not receive any economic benefit from any person, company, or organization, other than Koala Financial in exchange for providing clients advisory services through Koala Financial.

Item 6: Supervision

As a representative of Koala Financial, Alexander Michael Wymore is supervised by Benjamin Robert Koala, the firm's Chief Compliance Officer. Benjamin Robert Koala is responsible for ensuring that Alexander Michael Wymore adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Benjamin Robert Koala is (619) 475-5542.

Item 7: Requirements For State Registered Advisers

This disclosure is required by state securities authorities and is provided for your use in evaluating this investment advisor representative's suitability.

A. Alexander Michael Wymore has NOT been involved in any of the events listed below.

1. An award or otherwise being found liable in an arbitration claim alleging damages in excess of \$2,500, involving any of the following:
 - a) an investment or an investment-related business or activity;
 - b) fraud, false statement(s), or omissions;
 - c) theft, embezzlement, or other wrongful taking of property;
 - d) bribery, forgery, counterfeiting, or extortion; or
 - e) dishonest, unfair, or unethical practices.

2. An award or otherwise being found liable in a civil, self-regulatory organization, or administrative proceeding involving any of the following:
 - a) an investment or an investment-related business or activity;
 - b) fraud, false statement(s), or omissions;
 - c) theft, embezzlement, or other wrongful taking of property;
 - d) bribery, forgery, counterfeiting, or extortion; or
 - e) dishonest, unfair, or unethical practices.

B. Alexander Michael Wymore has NOT been the subject of a bankruptcy.