Fortune Oak Advisory

17305 S Mill Creek Rd
Noblesville, IN 46062

www.fortuneoak.com

317-966-8201

October 16, 2026

Brochure Supplement (Form ADV Part 2B)

William H. Syrus

Item 1: Cover Page

This brochure supplement provides information about William Syrus that supplements the Fortune Oak Advisory brochure. His individual CRD number is 8004060. Please contact William Syrus if the Firm brochure was not provided. Additional information about William Syrus is available on the SEC's website at www.adviserinfo.sec.gov.

This Brochure Supplement is new as of September 9, 2026

Item 2 Education Background and Business Experience

William H. Syrus
Year of Birth: 1999

Education:

Hillsdale College – B.S., Finance and Financial Management, Graduated December 2022

Business Background:

09/2026 – Present	Fortune Oak Advisory, LLC, Owner, Chief Compliance Officer, and Investment Adviser Representative
01/2023 – 07/2026	Valeo Financial Advisors, LLC, Financial Advisor
08/2018 – 12/2022	Hillsdale College Student, Student

Professional Designations:

Certified Financial Planner™: (CFP®)
The CFP® marks identify those individuals who have met the rigorous experience and ethical requirements of CFP Board, including having successfully completed financial planning coursework at an accredited college or university and passed the 6-hour comprehensive CFP® certification exam. The exam covers the following areas: Professional Conduct and Regulations, General Principles of Financial Planning, Risk Management and Insurance Planning, Investment Planning, Tax Planning, Retirement Savings and Income Planning, Estate Planning and Psychology of Financial Planning.

Item 3 Disciplinary Information

William Syrus has nothing to report under this section.

Item 4 Other Business Activities

William Syrus has nothing to report under this section.

Item 5 Additional Compensation

William Syrus does not receive any additional compensation.

Item 6 Supervision

William Syrus is the Chief Compliance Officer of the Firm. William Syrus is not supervised by someone else because he is the Chief Compliance Officer at the Firm. As the Chief Compliance Officer, William Syrus is responsible for ensuring that he 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 William Syrus is 317-966-8201

Item 7 Requirements for State-Registered Advisers

A. William Syrus has not been involved with any arbitration or administrative proceeding events.
B. William Syrus has not been the subject of a bankruptcy petition.