

Safe Future Wealth Partners LLC

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Form ADV Part 2A Brochure

March 28, 2025

Safe Future Wealth Partners LLC is a registered investment adviser. An "investment adviser" means any person who, for compensation, engages in the business of advising others, either directly or through publications or writings, as to the value of securities or as to the advisability of investing in, purchasing, or selling securities, or who, for compensation and as part of a regular business, issues or promulgates analyses or reports concerning securities. Registration with the SEC or any state securities authority does not imply a certain level of skill or training.

This brochure provides information about the qualifications and business practices of Safe Future Wealth Partners LLC. If you have any questions about the contents of this brochure, please contact our Chief Compliance Officer at (734) 548-7472 or Hary@Safefuturewealthpartners.com. Information in this brochure has not been approved or verified by the United States Securities and Exchange Commission or by any state securities authority.

Additional information about Safe Future Wealth Partners LLC is available on the SEC's website at www.adviserinfo.sec.gov. Our firm's CRD# is 315459.

Item 2 – Material Changes

The purpose of this page is to inform you of any material changes since the previous version of this disclosure brochure. We will review and update our brochure, as needed and at least annually, to make sure that it remains current.

On March 28, 2025 we submitted our annual updating amendment for fiscal year 2024. There were no material changes to report.

If you would like to receive a complete copy of our current brochure free of charge at any time, please contact our Chief Compliance Officer at (734) 548-7472 or Hary@Safefuturewealthpartners.com.

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Item 4 - Advisory Business

Safe Future Wealth Partners LLC (hereinafter "Safe Future Wealth Partners" or the "firm") is a registered investment adviser based in Novi, Michigan. We are a limited liability company, organized under the laws of the state of Michigan. We have been providing investment advisory services since 2021. Joseph E. Uppleger III is the sole owner and Managing Member of Safe Future Wealth Partners. Haryanto P. Sastro is the Chief Compliance Officer of the firm. Currently, we offer the investment advisory services described in this section. Please refer to the description of each investment advisory service listed below for information on how we tailor our advisory services to your individual needs.

As used in this brochure, the words "we," "our," and "us" refer to our firm, and the words "you," "your," and "client" refer to you as either a client or prospective client of our firm.

Any material conflicts of interest between you and our firm, or our employees are disclosed in this Disclosure Brochure. If at any time, additional material conflicts of interest arise, we will provide you with written notification of the material conflicts of interest or an updated Disclosure Brochure.

Selection of Other Advisers

We may recommend that you use the services of, or specific programs offered through, an unaffiliated third-party investment adviser ("TPIA") to manage your entire, or a portion of your, investment portfolio. All TPIAs referred by our firm must be registered as investment advisers or exempt from registration requirements in applicable jurisdictions. After gathering information about your financial situation and objectives, we may refer you to a specific TPIA or investment program. Factors that we take into consideration when making our referrals include, but are not limited to, the following: the TPIA's performance, strategies, methods of analysis, fees, expenses, and compliance capabilities, as well as your financial needs, investment goals, risk tolerance, and investment objectives. We will periodically monitor the TPIA's performance to ensure its management and investment style remains aligned with your investment goals and objectives.

We expect that in most circumstances, the TPIA will actively manage your portfolio and will assume discretionary investment authority over your account. We will not assume discretionary authority to hire and fire TPIAs and/or to reallocate your assets to other TPIAs/programs, but we may make recommendations to do so, where we deem such action to be appropriate.

You will be required to sign an advisory agreement directly with the referred TPIA. You may terminate your advisory relationship with the TPIA according to the terms of your agreement with the TPIA. You should review each TPIA's disclosure brochure and advisory agreement for specific information on how you may terminate your advisory relationship with the TPIA and how you may receive a refund, if applicable. You should contact the TPIA directly for questions regarding your advisory agreement with the TPIA.

Financial Planning

We offer financial planning services to clients at no additional fee. This services may include the following;

- Collaborate with clients from start to finish, including goals, discovery, planning, progress tracking and interactive meetings.
- Build a goals-based investing strategy that is designed to help clients stay the course and reach their goals.
- See how changes to the plan can have an impact on the future with "What-If" scenarios.
- Assist in organizing wills, powers of attorney and updated beneficiary information.
- Help investors gain insight into their values around money and facilitate the most important conversations they'll ever have.

- Help investors prioritize their values, assess their fulfillment within six major wellness categories and then form goals around those values.

Types of Investments

We typically do not recommend specific securities or one particular type of security over other types of securities. Generally, clients may not impose restrictions on investing in certain securities or types of securities in accounts managed by a TPIA. Please consult with the recommended TPIA regarding their policies on imposing restrictions on investments in particular securities or certain types of securities.

Client Tailored Services and Client Imposed Restrictions

Safe Future Wealth Partners will tailor a program for each individual client. This will include an interview session to get to know the client's specific needs and requirements as well as a plan that will be executed by Safe Future Wealth Partners on behalf of the client. Safe Future Wealth Partners may use model allocations, together with a specific set of recommendations for each client based on their personal restrictions, needs, and targets. Clients may/ may not impose restrictions in investing in certain securities or types of securities in accordance with their values or beliefs. However, if the restrictions prevent Safe Future Wealth Partners from properly servicing the client account, or if the restrictions would require Safe Future Wealth Partners to deviate from its standard suite of services, Safe Future Wealth Partners reserves the right to end the relationship.

Wrap Fee Programs

Safe Future Wealth Partners does not manage or sponsor any wrap fee programs. However, recommended TPIAs may offer wrapped and/or non-wrapped pricing options. Wrap pricing structures allow the client to pay an all-inclusive fee for management, brokerage, clearance, custody, and administrative services. Transaction costs may also be charged for the execution and clearance of advisory transactions directed by such TPIAs. A complete description of the programs and services provided, the amount of total fees, the payment structure, termination provisions, and other aspects of each program are detailed and disclosed in: i) the TPIA's Form ADV Part 2A; ii) the program wrap brochure (if applicable) or other applicable disclosure documents; iii) the disclosure documents of the portfolio manager(s) selected; or, iv) the TPIA's, the broker-dealer's, and/or the custodian's account opening documents. A copy of all relevant disclosure documents of the TPIA and of the individual portfolio manager(s) will be provided to anyone interested in these programs/managers.

Assets Under Management

As of December 2024, we have \$766,023 regulatory assets under management on a discretionary basis and \$8,436,988 on a non-discretionary basis to report under this heading.

Item 5 - Fees and Compensation

Third Party Investment Adviser Fees

The total fees charged by the TPIA, including the portion shared with our firm, will not exceed 1.50% of assets under management per year.

Safe Future Wealth Partners may refer potential clients to other various independent registered investment advisers. In such situations, Safe Future Wealth Partners will share in the fee paid by you, as the client, to the TPIA. The key compensation terms are disclosed in the TPIA's disclosure documents as well as in disclosures provided by Safe Future Wealth Partners (of which you will be required to acknowledge receipt). These fees are negotiable. Our compensation may differ depending upon our firm's individual agreement with each TPIA. Typically, our portion of the fee will be up to 1.0%. Safe Future Wealth Partners or its Associated Persons may have an incentive to recommend one TPIA over another TPIA with whom it has less favorable compensation arrangements or other advisory programs offered by TPIAs with which it has no compensation arrangements. In order to address this conflict our firm has adopted a code of ethics that obliges all associated persons to deal fairly with all clients, to uphold their fiduciary duty, and to put the client's interest first. Clients are not required to use the services of any TPIA we recommend. The total fees charged by the TPIA, including the portion shared with our firm, will not exceed 1.50% of assets under management per year. Safe Future Wealth Partners does not bill clients directly and does not deduct advisory fees from client accounts. All fees are deducted by the TPIA managing the account and a portion of that fee is paid to our firm. Advisor does not charge additional management fees for third party managed assets. The fees will be paid in accordance with the policies and contract of the third-party manager with which the client engages. Similar services may be available for a lower rate. The formula in which is used to calculate the fees is as follows: $(\$100,000 \times 1.50\%) / 12 = \125 per month. Neither our firm nor persons associated with our firm accept compensation for the sale of securities, including asset-based sales charges or service fees from the sale of mutual funds. However, if you purchase certain insurance products through our firm or licensed persons associated with our firm, we and/or they will receive commission-based compensation as disclosed throughout this disclosure brochure

Additional Fees and Expenses

As part of the advisory services provided through TPIAs, you may be invested in, or solicited to invest in, mutual funds and exchange traded funds. The management fees that you pay to the TPIA (including the portion paid to our firm) are separate and distinct from the fees and expenses charged by mutual funds or exchange traded funds (as described in each fund's prospectus) to their shareholders. These fees will generally include a management fee and other fund expenses. You will also incur transaction charges and/or brokerage fees when purchasing or selling securities. These charges and fees are typically imposed by the broker-dealer or custodian through which your account transactions are executed. We do not share in any portion of the brokerage fees/transaction charges imposed by the broker-dealer or custodian. To fully understand the total cost you will incur, you should review all the fees charged by mutual funds, exchange traded funds, TPIAs, and others.

Compensation for the Sale of Insurance Products

Individuals associated with Safe Future Wealth Partners, including Mr. Uppleger and Mr. Sastro, are licensed, independent insurance agents/producers. Mr. Uppleger is currently licensed in Michigan and Mr. Sastro is currently licensed in Michigan only. Safe Future Wealth Partners is affiliated through common control and ownership with Safe Future Financial LLC, a licensed insurance agency owned by Mr. Uppleger. The firm and licensed persons are eligible to earn commission-based compensation for selling insurance products, including insurance products they sell to you. Insurance services and commissions are separate and in addition to advisory services and fees.

Receipt of commission-based compensation presents a conflict of interest because our firm and persons providing investment advice on behalf of our firm who are licensed insurance agents have an incentive to recommend insurance products to you for the purpose of generating commissions rather than recommendations made solely based on your needs. Clients are under no obligation contractually or otherwise, to purchase insurance products through any person or entity affiliated with our firm.

Item 6 - Performance-Based Fees and Side-By-Side Management

Performance based fees are based on a share of capital gains on or capital appreciation of the client's assets. Safe Future Wealth Partners does not accept performance based fees.

Item 7 - Types of Clients

We generally offer investment advisory services to individuals. Accounts managed by TPIAs may be subject to minimum investment requirements. We will only recommend TPIAs and/or programs for which you meet any minimum requirements. Please review the applicable disclosure brochures and client agreements of the recommended TPIAs for information on any minimum requirements they may require.

Some recommended TPIAs charge a nominal annual flat account fee, which is typically \$35 per account. All fees to be paid by the client will be clearly disclosed in the client's agreement with the TPIA.

Item 8 - Methods of Analysis, Investment Strategies and Risk of Loss

Our firm will refer clients to TPIAs that provide advice to clients in accordance with the relevant programs provided by the TPIA. We will assist you in selecting TPIAs whose investment programs and strategies we have reviewed and determined to be appropriate for you based on your individual circumstances and investment goals. We will not recommend particular securities or directly manage your assets. Clients should refer to the disclosure documents provided by the TPA for more information about these firm's methods of analysis, investment strategies, and risks associated with investments.

Investing in securities involves risk of loss that clients should be prepared to bear. Clients should fully understand the nature of the contractual relationship(s) into which they are entering and the extent of their exposure to risk. Certain investing strategies may not be suitable for everyone. You should carefully consider whether the strategies employed would be appropriate for you in light of your experience, objectives, financial resources, and other relevant circumstances.

General Investment Risk: All investments come with the risk of loss. Investing may involve substantial risks, including complete possible loss of principal plus other losses and may not be suitable for everyone. Investments, unlike savings and checking accounts at a bank, are not insured by the government to protect against market losses. Different market instruments carry different types and degrees of risk and you should familiarize yourself with the risks involved in the particular market instruments in which you intend to invest.

Loss of Value: There can be no assurance that a specific investment will achieve its investment objectives and past performance should not be seen as a guide to future returns. The value of investments and the income derived may fall as well as rise and investors may not recoup the original amount invested. Investments may also be affected by any changes in exchange control regulation, tax laws, withholding taxes, international, political, and economic developments, and government, economic or monetary policies.

Cybersecurity Risks: Our firm and our service providers are subject to risks associated with a breach in cybersecurity. Cybersecurity is a generic term used to describe the technology, processes, and practices designed to protect networks,

systems, computers, programs, and data from cyber-attacks and hacking by other computer users, and to avoid the resulting damage and disruption of hardware and software systems, loss or corruption of data, and/or misappropriation of confidential information. In general, cyber-attacks are deliberate; however, unintentional events may have similar effects. Cyber-attacks may cause losses to clients by interfering with the processing of transactions, affecting the ability to calculate net asset value or impeding or sabotaging trading. Clients may also incur substantial costs as the result of a cybersecurity breach, including those associated with forensic analysis of the origin and scope of the breach, increased and upgraded cybersecurity, identity theft, unauthorized use of proprietary information, litigation, and the dissemination of confidential and proprietary information. Any such breach could expose our firm to civil liability as well as regulatory inquiry and/or action. In addition, clients could be exposed to additional losses as a result of unauthorized use of their personal information. While our firm has established a business continuity plan and systems designed to prevent cyber- attacks, there are inherent limitations in such plans and systems, including the possibility that certain risks have not been identified. Similar types of cyber security risks are also present for issuers of securities, investment companies and other investment advisers in which we invest, which could result in material adverse consequences for such entities and may cause a client's investment in such entities to lose value.

Recommendation of Other Advisers

In the event we recommend a third-party investment adviser (TPIA) to manage all or a portion of your assets, we will advise you on how to allocate your assets among various classes of securities or TPIAs, programs, or managed model portfolios. As such, we will primarily rely on investment model portfolios and strategies developed by the TPIAs and their portfolio managers. If there is a significant deviation in characteristics or performance from the stated strategy and/or benchmark, we may recommend changing models or replacing a TPIA. The primary risks associated with investing with a third party is that while a particular third party may have demonstrated a certain level of success in the past; it may not be able to replicate that success in future markets. In addition, as we do not control the underlying investments in third party model portfolios, there is also a risk that a third party may deviate from the stated investment mandate or strategy of the portfolio, making it a less suitable investment for our clients. To mitigate this risk, we seek third parties with proven track records that have demonstrated a consistent level of performance and success over time. A third party's past performance is not a guarantee of future results and certain market and economic risks exist that may adversely affect an account's performance that could result in capital losses in your account. Please refer to the TPIA's advisory agreements, Form ADV Brochure, and associated disclosure documents for details on their specific investment strategies, methods of analysis, and associated risks.

Item 9 - Disciplinary Information

Registered investment advisers are required to disclose legal or disciplinary events that would be material to your evaluation of us or of the integrity of our management. Neither Safe Future Wealth Partners nor any of our management persons have been involved in any reportable criminal, civil, or self-regulatory organization action, or any administrative proceeding before any federal or foreign regulatory agency, or self-regulatory organization. However, in 2018, Mr. Uppleger's insurance licenses were temporarily suspended for one week pending completion of continuing education requirements. His licenses were reinstated on 05/08/2021 upon completion of continuing education requirements. Also, in 2018, Mr. Uppleger and his affiliated insurance agency, Safe Future Financial LLC, entered into a stipulation order with the Michigan Department of Insurance and Financial Services (DIFS) in which it was alleged that Mr. Uppleger and Safe Future Financial LLC knowingly misrepresented the terms of an insurance application, including the source of the funds and replacement of prior annuities, as well as drafting a letter for the customer to sign that knowingly contained false material information. Mr. Uppleger and Safe Future Financial LLC agreed to pay administrative and civil fines to the state through DIFS in the amount of \$10,000. In 2023 the State of Florida, Department of Financial Services, Division of Insurance Agency and Agency Services suspended Mr. Uppleger's insurance license for 12 months and fined him \$1,500 for failure to notify the state of an administrative action brought against him by another state insurance regulator. Additional information regarding our firm and Mr. Uppleger can be found online at www.adviserinfo.sec.gov. The firm's CRD number is 315459

Information regarding Mr. Sastro's disclosure history can be found online at www.adviserinfo.sec.gov. His individual CRD number is 3091945.

Item 10 - Other Financial Industry Activities or Affiliations

Neither Safe Future Wealth Partners nor its advisory affiliates are registered as, or have pending applications to register as, brokers/dealers, Futures Commission Merchants, Commodity Pool Operators, or Commodity Trading Advisors, or are currently an associated person of any the foregoing types of entities

Registrations with Other Investment Advisers

Neither our firm nor persons associated with our firm serve as an officer, owner, or director of any recommended TPIA.

Recommendation of Other Advisers

Where you engage a TPIA that we recommend, we will receive compensation from the TPIA for recommending that you use their services. These compensation arrangements present a conflict of interest because we have a financial incentive to recommend the services of a particular TPIA over another TPIA with which we have more favorable compensation arrangements or other professional relationships. Comparable services may be available for lower or higher fees through other service providers with which we have no compensation arrangements or other professional relationships. In order to address this conflict, our firm has adopted a code of ethics that obliges all associated persons to deal fairly with all clients, to uphold their fiduciary duty, and to put the client's interest first. Clients are not required to use the services of any TPIA we recommend.

Insurance Activities

Please refer to Item 5 above for information about compensation received by our affiliated insurance agency, Safe Future Financial LLC, and/or licensed individuals associated with Safe Future Wealth Partners for the sale of insurance products. Individuals associated with Safe Future Wealth Partners, including Mr. Uppleger and Mr. Sastro, are licensed, independent insurance agents/producers. Mr. Uppleger is currently licensed in Michigan and

Mr. Sastro is currently licensed in Michigan only. Safe Future Wealth Partners is affiliated through common control and ownership with Safe Future Financial LLC, a licensed insurance agency owned by Mr. Uppleger. The firm and licensed persons are eligible to earn commission-based compensation for selling insurance products, including insurance products they sell to you. Insurance services and commissions are separate and in addition to advisory services and fees. Joe Uppleger III also has a non-resident license in the following states: AR, AZ, CA, CO, CT, DE, DC, GA, IA, ID, IL, KY, LA, MD, ME, MN, MO, MS, MT, NC, ND, NE, NH, NJ, OH, OK, RI, SC, TN, TX, UT, WV, WY. Haryanto Sastro also has a non-resident license in the following states: FL, ME, NC, TX, and VA.

Receipt of commission-based compensation presents a conflict of interest because our firm and persons providing investment advice on behalf of our firm who are licensed insurance agents have an incentive to recommend insurance products to you for the purpose of generating commissions rather than recommendations made solely based on your needs. Clients are under no obligation contractually or otherwise, to purchase insurance products through any person or entity affiliated with our firm.

Item 11 - Code of Ethics, Participation or Interest in Client Transactions and Personal Trading

Description of Our Code of Ethics

Safe Future Wealth Partners has adopted a Code of Ethics (the “Code”) to address investment advisory conduct. The Code focuses primarily on fiduciary duty, personal securities transactions, insider trading, gifts, and conflicts of interest. The Code includes the firm’s policies and procedures developed to protect client’s interests in relation to the following topics:

- The duty at all times to place the interests of clients first;
- The requirement that all personal securities transactions be conducted in such a manner as to be consistent with the code of ethics.
- The responsibility to avoid any actual or potential conflict of interest or misuse of an employee’s position of trust and responsibility;
- The fiduciary principle that information concerning the identity of security holdings and financial circumstances of clients is confidential; and
- The principle that independence in the investment decision-making process is paramount.

A copy of the firm’s Code of Ethics is available upon request by contacting our Chief Compliance Officer at (734) 548-7472 or Hary@Safefuturewealthpartners.com.

Participation or Interest in Client Transactions

We endeavor to uphold our fiduciary responsibilities to our clients at all times. Neither Safe Future Wealth Partners nor any related person of our firm buys, sells, or recommends specific securities for clients’ investment accounts through Safe Future Wealth Partners in which our firm or any related person of our firm has a material financial interest.

As part of its Code of Ethics, we have implemented a restricted list to ensure that neither it nor its representatives will trade in securities that we also recommend to clients.

Item 12 - Brokerage Practices

Brokerage Practices

Due to the nature of our business, we do not manage client assets directly; rather, client assets are managed by a TPIA recommended by our firm or independently selected by the client. Clients who have implemented investments through a recommended TPIA may be encouraged or required to use the broker-dealers and/or custodians recommended or selected by the TPIA. You should review each recommended TPIA's disclosure brochure for specific information on their brokerage practices.

Research and Other Soft Dollar Benefits

We do not receive any research or other soft dollar benefits from broker-dealers in connection with client securities transactions.

Brokerage for Client Referrals

We do not receive client referrals from broker-dealers and custodians and we do not receive other benefits from a broker-dealer in exchange for client referrals.

Directed Brokerage

Safe Future Wealth Partners does not directly manage client assets; therefore, it does not direct client brokerage.

Trade Aggregation/Block Trading

Safe Future Wealth Partners does not place any trades or block trades (i.e., aggregate trades for multiple client accounts for an average share price). However, TPIAs may or may not aggregate trades for client accounts.

Item 13 - Review of Accounts

Account Reviews

Mr. Sastro, Chief Compliance Officer, will review client accounts on a periodic basis and review periodic reports provided to the client by TPIAs (if any) and/or account custodians. Under normal circumstances, he will contact the client at least annually, or more often as agreed upon with each client, to review the client's financial situation and objectives, communicate information to the TPIA managing the account as necessary, and to assist the client in understanding and evaluating the services provided by the TPIA. Clients will be expected to notify our firm of any changes in their financial situation, investment objectives, or account restrictions. Additional reviews may be provided upon client request or when client circumstances change.

We will not execute, effect, or arrange, in any way, any transactions or changes in asset allocation on your behalf through Safe Future Wealth Partners. But, in addition to the statements clients will receive directly from their account custodian(s) at least quarterly, the TPIA may or may not provide periodic reports related to the account holdings, market values, and performance. Information regarding account reviews and additional reporting provided by TPIAs managing client accounts is disclosed in the separate disclosure documents maintained and provided by relevant TPIAs.

If you have questions about your account statements from the account custodian, you should contact the TPIA and/or the custodian preparing the statement.

Item 14 - Client Referrals and Other Compensation

Our firm does not compensate, directly or indirectly, any person or entity for client referrals. However, we do share in a portion of the advisory fees paid to TPIAs to which we refer clients for the management of their accounts. This compensation arrangement presents a conflict of interest due to a financial incentive to recommend the services of the TPIA. However, you are not obligated to use the services of any TPIA we recommend.

Item 15 - Custody

We do not directly debit fees from your accounts and do not otherwise exercise custody over your funds or securities.

Item 16 - Investment Discretion

We do not have investment discretion over your funds or securities. Where client assets are managed by TPIA(s), such TPIA(s) may have discretion pursuant to the management agreement signed with the client.

Item 17 - Voting Client Securities

Proxy Voting

Safe Future Wealth Partners will not vote proxies on behalf of clients' accounts managed by third parties. We will not offer clients advice regarding corporate actions and the exercise of proxy voting rights and/or materials. In most cases, you will receive proxy materials directly from the account custodian. However, in the event we were to receive any written or electronic proxy materials, we would forward them directly to you by mail, unless you have authorized our firm to contact you by electronic mail, in which case, we would forward any electronic solicitations to vote proxies. Refer to the disclosure brochure of recommended TPIAs for information on their proxy voting policies.

Item 18 - Financial Information

Safe Future Wealth Partners is required in this Item to provide you with certain financial information or disclosures about its financial condition. Safe Future Wealth Partners does not require the prepayment of over \$500 per client, six or more months in advance. Additionally, we have no financial condition or commitment that impairs our ability to meet contractual and fiduciary commitments to clients, and our firm has not been the subject of a bankruptcy proceeding. However, Mr. Sastro, our Chief Compliance Officer, filed Chapter 13 bankruptcy in 2014. It was discharged in 2016. Additional information can be found at www.adviserinfo.gov by searching his individual CRD number, which is 3091945.

Item 19 - Requirements of State-Registered Advisers

Principal Executive Officer and Management Persons

Joseph E. Uppleger III

Year of Birth: 1968

Formal Education After High School:

- None

Business Background for the Previous Five Years:

- Safe Future Wealth Partners LLC, Managing Member/Owner, 05/2021 to Present
- Safe Future Financial LLC, Owner, 08/2015 to Present

Haryanto P. Sastro

Year of Birth: 1970

Formal Education After High School:

- University of Maryland College Park (1989-1991)
- University of Maryland University College (2002-2003)

Business Background for the Previous Five Years:

- Safe Future Wealth Partners LLC, Chief Compliance Officer/Investment Adviser Representative, 06/2021 to Present
- Aegis Wealth Management, Inc., Investment Adviser Representative, 01/2020 to 05/2023
- Aegis Financial, Regional Vice President, 06/2015 to Present

Performance Based Fees

Performance based fees are based on a share of capital gains on or capital appreciation of the client's assets. We do not accept performance based fees.

Disciplinary Information

See Item 9 above regarding legal or disciplinary events involving our firm and/or management persons

Other Relationships or Arrangements With Issuers of Securities

We have no relationships or arrangements with any issuer of securities.

ADV Part 2B Brochure Supplement - Haryanto P. Sastro

Haryanto P. Sastro

CRD Number: 3091945

Chief Compliance Officer / Investment Adviser Representative

Safe Future Wealth Partners LLC

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Form ADV Part 2B Brochure Supplement

September 10, 2024

This Brochure Supplement provides information about Haryanto P. Sastro that supplements the Disclosure Brochure of Safe Future Wealth Partners LLC (hereinafter "Safe Future Wealth Partners"), a copy of which you should have received. Please contact us at (734) 548-7472 if you did not receive the Disclosure Brochure or if you have any questions about the contents of this Brochure Supplement.

Additional information about Mr. Sastro is available on the SEC's website at www.adviserinfo.sec.gov. Mr. Sastro's individual CRD number is 3091945.

Item 2 - Educational Background and Business Experience

Haryanto P. Sastro

Year of Birth: 1970

Formal Education After High School:

- University of Maryland College Park (1989-1991)
- University of Maryland University College (2002-2003)

Business Background for the Previous Five Years:

- Safe Future Wealth Partners LLC, Chief Compliance Officer/Investment Adviser Representative, 06/2021 to Present
- Aegis Wealth Management, Inc., Investment Adviser Representative, 01/2020 to 05/2023
- Aegis Financial, Regional Vice President, 06/2014 to Present

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 Mr. Sastro. Mr. Sastro has never been involved in any reportable criminal or civil actions, administrative proceedings before any federal or state regulatory agencies, foreign regulatory agency, or self-regulatory agency, or any other reportable legal or disciplinary matters. However, information regarding Mr. Sastro's history can be found online at www.adviserinfo.sec.gov. His individual CRD number is 3091945.

Item 4 - Other Business Activities

Mr. Sastro is also licensed as an insurance agent/producer. Mr. Sastro is currently licensed in the state of Michigan only. In this capacity, he can affect transactions in insurance products for advisory and non-advisory clients and earn commissions for these activities. The advisory fees you pay our firm for advisory services are separate and distinct from the commissions earned by Mr. Sastro for insurance related activities. This presents a conflict of interest because Mr. Sastro has an incentive to recommend insurance products to you for the purpose of generating commissions rather than making such recommendations based solely on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through Mr. Sastro or any person or entity affiliated with our firm.

Item 5 - Additional Compensation

Apart from sharing in advisory fees paid by clients to third party investment advisers (TPIAs) and the other business activities described above in Item 4 of this brochure supplement, Mr. Sastro does not receive additional compensation or economic benefits in connection with providing services through Safe Future Wealth Partners.

Item 6 - Supervision

Mr. Sastro is an investment adviser representative of Safe Future Wealth Partners. He is also the Chief Compliance Officer of Safe Future Wealth Partners. In this capacity, Mr. Sastro is responsible for the implementation of the firm's compliance program. He reports directly to Joseph E. Uppleger, Managing Member/Owner of the firm. Mr. Uppleger can be reached at (734) 548-7472 or at joe@safefuturewealthpartners.com.

Safe Future Wealth Partners has implemented a Code of Ethics and an internal compliance program that guides the firm in meeting its fiduciary obligations to clients. Mr. Sastro and Mr. Uppleger adhere to the code of ethics and compliance manual as mandated. Clients may contact Mr. Sastro at (734) 548-7472 or Hary@safefuturewealthpartners.com to obtain a copy of our firm's code of ethics.

Additionally, Safe Future Wealth Partners is subject to regulatory oversight by various agencies. These agencies require registration by Safe Future Wealth Partners and its investment adviser representatives. As a registered entity, Safe Future Wealth Partners is subject to examinations by regulators, which may be announced or unannounced. Safe Future Wealth Partners is required to periodically update the information provided to these agencies and to provide various reports regarding firm business.

Item 7 - Requirements for State-Registered Advisers

This disclosure is required by state securities authorities. As such, we are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of Mr. Sastro.

- A. Mr. Sastro 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.
 - 1. 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. Mr. Sastro has been the subject of a bankruptcy. He filed Chapter 13 in 2014; it was discharged in 2016.

Additional information regarding Mr. Sastro's history can be found online at www.adviserinfo.sec.gov. His individual CRD number is 3091945.

ADV Part 2B Brochure Supplement - Joseph Earl Uppleger IV

Joseph Earl Uppleger IV

CRD Number: 7633107

Investment Adviser Representative

Safe Future Wealth Partners LLC

Primary Office:

41800 W. 11 Mile Road, STE 201

Novi, MI 48375

Phone: (833) 422-8010

Email: J4@Safefuturewealthpartners.com

Form ADV Part 2B Brochure Supplement

December 5, 2024

This Brochure Supplement provides information about Joseph Earl Uppleger IV that supplements the Disclosure Brochure of Safe Future Wealth Partners LLC (hereinafter “Safe Future Wealth Partners”), a copy of which you should have received. Please contact us at (734) 548-7472 if you did not receive the Disclosure Brochure or if you have any questions about the contents of this Brochure Supplement.

Additional information about Mr. Uppleger is available on the SEC’s website at www.adviserinfo.sec.gov. Mr. Uppleger’s individual CRD number is 7633107.

Item 2 - Educational Background and Business Experience

Joseph Earl Uppleger IV

Year of Birth: 1994

Formal Education After High School:

- None

Business Background for the Previous Five Years:

- Safe Future Wealth Partners LLC, Investment Adviser Representative, 09/2022 - Present
- Safe Future Financial, Advisor/Admin, 02/2022 - Present
- Safe Future Wealth Partners, Advisor/Admin, 02/2022 - Present
- Aegis Wealth Management, Investment Adviser Representative, 08/2022 – 05/2023
- Door Dash, Driver, 03/2021 - 02/2022
- Amazon Flex, Driver, 06/2021 - 02/2022
- DK Security, Security Officer, 07/2018 - 03/2021
- CVS Health, Pharmacy Technician, 09/2013 - 05/2019
- Pinckney Community High School, Student, 09/2009 - 06/2013

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 Mr. Uppleger. Mr. Uppleger has never been involved in any reportable criminal or civil actions, administrative proceedings before any federal or state regulatory agencies, foreign regulatory agency, or self-regulatory agency, or any other reportable legal or disciplinary matters. However, information regarding Mr. Uppleger's history can be found online at www.adviserinfo.sec.gov. His individual CRD number is 7633107.

Item 4 - Other Business Activities

Joseph Earl Uppleger IV is a licensed insurance agent. 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 SFWPL are not made in their capacity as a fiduciary, and products are limited to only those offered by certain insurance providers. SFWPL 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. SFWPL 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. SFWPL 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 SFWPL'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

Apart from sharing in advisory fees paid by clients to third party investment advisers (TPIAs) and the other business activities described above in Item 4 of this brochure supplement, Mr. Uppleger does not receive additional compensation or economic benefits in connection with providing services through Safe Future Wealth Partners.

Item 6 - Supervision

As a representative of Safe Future Wealth Partners LLC, Joseph Earl Uppleger IV is supervised by Hary Sastro, the firm's Chief Compliance Officer. Hary Sastro is responsible for ensuring that Joseph Earl Uppleger IV 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.

Safe Future Wealth Partners has implemented a Code of Ethics and an internal compliance program that guides the firm in meeting its fiduciary obligations to clients. Mr. Sastro and Mr. Uppleger adhere to the code of ethics and compliance manual as mandated. Clients may contact Mr. Sastro at (734) 548-7472 or Hary@Safefuturewealthpartners.com to obtain a copy of our firm's code of ethics.

Additionally, Safe Future Wealth Partners is subject to regulatory oversight by various agencies. These agencies require registration by Safe Future Wealth Partners and its investment adviser representatives. As a registered entity, Safe Future Wealth Partners is subject to examinations by regulators, which may be announced or unannounced. Safe Future Wealth Partners is required to periodically update the information provided to these agencies and to provide various reports regarding firm business.

Item 7 - Requirements for State-Registered Advisers

This disclosure is required by state securities authorities. As such, we are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of Mr. Uppleger.

- B. Mr. Uppleger 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. Mr. Uppleger has NOT been the subject of a bankruptcy.

Additional information regarding Mr. Uppleger's history can be found online at www.adviserinfo.sec.gov. His individual CRD number is 7633107.

ADV Part 2B Brochure Supplement - Mark Bradley Perry

Mark Bradley Perry

CRD Number: 2334376

Investment Adviser Representative

Safe Future Wealth Partners LLC

Primary Office:

41800 W. 11 Mile Road, STE 201

Novi, MI 48375

Phone: (833) 422-8010

Fax: (866) 898-3217

Email: trustlawassociates@yahoo.com

Form ADV Part 2B Brochure Supplement

March 06, 2025

This Brochure Supplement provides information about Mark Bradley Perry that supplements the Disclosure Brochure of Safe Future Wealth Partners LLC (hereinafter "Safe Future Wealth Partners"), a copy of which you should have received. Please contact us at (734) 548-7472 if you did not receive the Disclosure Brochure or if you have any questions about the contents of this Brochure Supplement.

Additional information about Mr. Perry is available on the SEC's website at www.adviserinfo.sec.gov. Mr. Perry's individual CRD number is 2334376.

Item 2 - Educational Background and Business Experience

Mark Bradley Perry

Year of Birth: 1966

Formal Education After High School:

- PhD (anticipated 2025) Executive Leadership, Louisiana Baptist University (2025)
- M.B.A. Business Administration, Texas A and M - Texarkana (2003)
- M.H.A. Health Administration, Louisiana State University-Shreveport (2019)
- M.Div. Theology, Yale University (1995)
- J.D Law, University of Wisconsin Madison (1992)
- BBA Financial Services, Baylor University (1988)

Business Background for the Previous Five Years:

- Safe Future Wealth Partners LLC, Investment Adviser Representative, 09/2024 - Present
- Trustlaw Associates, Attorney, 07/1997 - Present
- Willis Knighton Health System, Dir. of Community and Human Relations, 01/2017 – 11/2023

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 Mr. Perry. Mr. Perry has never been involved in any reportable criminal or civil actions, administrative proceedings before any federal or state regulatory agencies, foreign regulatory agency, or self-regulatory agency, or any other reportable legal or disciplinary matters. However, information regarding Mr. Perry's history can be found online at www.adviserinfo.sec.gov. His individual CRD number is 2334376.

Item 4 - Other Business Activities

Mark Bradley Perry is a lawyer. From time to time, he will offer clients advice or products from this activity. Safe Future Wealth Partners LLC always acts in the best interest of the client. Clients are in no way required to utilize the services of any representative of Safe Future Wealth Partners LLC in their capacity as a lawyer.

Trust, Estate Planning and Elderlaw Law Firm, ranching and numerous other passively held interests in real estate and other non-securities related ventures.

Item 5 - Additional Compensation

Apart from sharing in advisory fees paid by clients to third party investment advisers (TPIAs) and the other business activities described above in Item 4 of this brochure supplement, Mr. Perry does not receive additional compensation or economic benefits in connection with providing services through Safe Future Wealth Partners.

Item 6 - Supervision

As a representative of Safe Future Wealth Partners LLC, Mark Bradley Perry is supervised by Hary Sastro, the firm's Chief Compliance Officer. Hary Sastro is responsible for ensuring that Mark Bradley Perry 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.

Safe Future Wealth Partners has implemented a Code of Ethics and an internal compliance program that guides the firm in meeting its fiduciary obligations to clients. Mr. Sastro and Mr. Uppleger adhere to the code of ethics and compliance manual as mandated. Clients may contact Mr. Sastro at (734) 548-7472 or Hary@Safefuturewealthpartners.com to obtain a copy of our firm's code of ethics.

Additionally, Safe Future Wealth Partners is subject to regulatory oversight by various agencies. These agencies require registration by Safe Future Wealth Partners and its investment adviser representatives. As a registered entity, Safe Future Wealth Partners is subject to examinations by regulators, which may be announced or unannounced. Safe Future Wealth Partners is required to periodically update the information provided to these agencies and to provide various reports regarding firm business.

Item 7 - Requirements for State-Registered Advisers

This disclosure is required by state securities authorities. As such, we are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of Mr. Perry.

- C. Mr. Perry 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:
 - f) an investment or an investment-related business or activity;
 - g) fraud, false statement(s), or omissions;
 - h) theft, embezzlement, or other wrongful taking of property;
 - i) bribery, forgery, counterfeiting, or extortion; or
 - j) dishonest, unfair, or unethical practices.
- B. Mr. Perry has NOT been the subject of a bankruptcy.

Additional information regarding Mr. Perry's history can be found online at www.adviserinfo.sec.gov. His individual CRD number is 2334376.

Privacy Notice

Safe Future Wealth Partners LLC

This notice is being provided to you in accordance with the Securities and Exchange Commission's rule regarding the privacy of consumer financial information ("Regulation S-P"). Please take the time to read and understand the privacy policies and procedures that we have implemented to safeguard your nonpublic personal information.

INFORMATION WE COLLECT

Safe Future Wealth Partners LLC must collect certain personally identifiable financial information about its customers to provide financial services and products. The personally identifiable financial information that we gather during the normal course of doing business with you may include:

- information we receive from you on applications or other forms;
- information about your transactions with us, our affiliates, or others;
- information we receive from a consumer reporting agency.

INFORMATION WE DISCLOSE

We do not disclose any nonpublic personal information about our customers or former customers to anyone, except as permitted or required by law, or as necessary to provide services to you. In accordance with Section 248.13 of Regulation S-P, we may disclose all of the information we collect, as described above, to certain nonaffiliated third parties such as our attorneys, accountants, auditors and persons or entities that are assessing our compliance with industry standards. We enter into contractual agreements with all nonaffiliated third parties that prohibit such third parties from disclosing or using the information other than to carry out the purposes for which we disclose the information.

CONFIDENTIALITY AND SECURITY

We restrict access to nonpublic personal information about you to those Employees who need to know that information to provide financial products or services to you. We maintain physical, electronic, and procedural safeguards that comply with federal standards to guard your nonpublic personal information.

ACCURACY

Safe Future Wealth Partners LLC strives to maintain accurate personal information in our Client files at all times. However, as personal situations, facts and data change over time; we encourage our Clients to provide feedback and updated information to help us meet our goals. If you have questions, please contact Haryanto P. Sastro, Chief Compliance Officer of our firm at (734) 548-7472 or Hary@Safefuturewealthpartners.com.

Effective September 2021