

Item 1- Cover Page

# Form ADV Part 2B Brochure Supplement

**Kyle Harsha**

**LexAurum Advisors, LLC**

**d/b/a “Harsha Advisory Group”**

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**(913) 261-9316**

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This Brochure Supplement provides information about Kyle Harsha that supplements the LexAurum Advisors, LLC (LexAurum) Brochure which you should have received. Please contact us at (913) 261-9316 if you did not receive the LexAurum Brochure or if you have any questions about it or the contents of this supplement.

Additional information about Mr. Harsha is available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## **Item 2- Educational Background and Business Experience**

Kyle Harsha, born in 1977, joined LexAurum in June 2020 as an investment advisor representative (IAR). Prior to LexAurum he was an IAR for Rise Consulting, LLC in May/June 2020. Before that he was an IAR (January 2017 to May 2020) and registered representative (March 2016 to May 2020) for HD Vest, now known as Avantax Investment Services. From January 2019 to present he also works with Money Matters Tax and Financial Services to provide tax and accounting services. He served in a sales role with Roasterie, Inc from August 2015 to December 2018. He works as a tax preparation professional with KL Johnson & Associates from March 2016 to December 2018. He worked in the wine industry with Vinoteca from January 2017 to December 2018. He served as the VP of Sales with Datix, Inc. from February 2014 to July 2015 and a producer with Senior Health Solutions from September 2013 to February 2014. He worked in the wine industry with Vintegrity Wines as a Sales Manager from April 2012 to September 2013, Harsha Wines as Co-Owner from June 2010 to April 2012 and Premier Cru Wine Company from May 2007 to June 2010.

Mr. Harsha graduated from Kansas State University with a Bachelor of Science in 1999.

Mr. Harsha also earned his designation as an Enrolled Agent (EA). An EA is a federally authorized tax practitioner who has technical expertise in the field of taxation and who is empowered by the U.S. Department of the Treasury to represent taxpayers before all administrative levels of the Internal Revenue Service for audits, collections and appeals. To become an EA, Mr. Harsha had to pass all three parts of the Special Enrollment Exam. To maintain the designation, he must obtain 72 hours of continuing education (CE) every three years with an IRS approved CE provider.

## **Item 3- Disciplinary Information**

Mr. Harsha is currently not subject to, nor has ever been subject to, any legal or disciplinary events of a material nature.

## **Item 4- Other Business Activities**

In addition, Mr. Harsha may derive substantial income and spend considerable time providing non-investment related services to Clients and third parties such as tax accounting, payroll, insurance, and other services not affiliated with Lex-Aurum.

Mr. Harsha is an enrolled agent and provides tax preparation and accounting services through Money Matters Tax and Financial Services. In this capacity he receives

compensation in connection with tax preparation services and accounting advice. Compensation earned by Mr. Harsha in his capacity as an enrolled agent is separate and in addition to advisory fees he earns. Although accepting outside compensation creates a conflict of interest as it creates an incentive to recommend his tax and accounting services, the client is under no obligation, contractually or otherwise, to engage Mr. Harsha for these services. Clients may be able to find the same or substantially similar services elsewhere for at a lower cost.

Mr. Harsha is licensed as an independent insurance agent. He earns commission-based compensation for selling insurance products to clients. Insurance commissions earned by Mr. Harsha are separate and in addition to advisory fees he earns. Accepting commission-based compensation poses a conflict of interest as it creates an incentive to effect insurance transactions for the purpose of generating compensation however, the client is under no obligation, contractually or otherwise, to purchase insurance products through Mr. Harsha. Further, based on current fiduciary and suitability standards, Mr. Harsha is required to make recommendations appropriate to each client's individual needs and objectives.

Mr. Harsha uses the business name "Harsha Advisory Group" to represent his investment business and "Money Matters Tax & Financial Services" for his tax and accounting business.

#### **Item 5- Additional Compensation**

Mr. Harsha does not receive any direct economic benefits or sales awards, from third parties, in connection with providing advisory services to clients. However, certain third-party advisers may provide reimbursements to financial advisors as an offset for marketing and seminar materials for the advisory products and services offered. These situations may also create conflicts of interest that you should carefully consider.

#### **Item 6 - Supervision**

Lex-Aurum maintains a supervisory structure designed to reasonably detect and prevent violations of securities laws, rules and regulations. This system includes written supervisory procedures, trained and qualified home office personnel, guidance issued to advisors in a compliance manual, and periodic office compliance inspections. Mr. Harsha reports to Peter W. Hughes, the CEO of the firm. Mr. Hughes can be reached at (913) 261-9316.