

ROKA Wealth Strategists, LLC

**1901 Macy Drive
Roswell, GA 30076**

Telephone: (770) 817-0412

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**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Kari March (CRD# 4021533) and Roger Roemmich (CRD# 1293322) that supplements ROKA Wealth Strategists, LLC's brochure. You should have received a copy of that brochure. Please contact ROKA at (770) 817-0412 or via e-mail at kmarch@rokawealthstrategists.com if you did not receive ROKA Wealth Strategists, LLC's brochure or if you have any questions about the contents of this supplement.

Educational Background and Business Experience

Kari March

Year of Birth: 1953

Formal Education After High School:

- Southern Illinois University, BS Agriculture 1971-1975

Business Background Preceding Five Years:

- ROKA Wealth Strategists, LLC 06/2006 to Present
- Triad Advisors, Inc., 06/2006 to Present
- H&R Block Financial Advisors 04/2002 – 06/2006

Roger Roemmich

Year of Birth: 1947

Formal Education After High School:

- Michigan State University, PhD, Accounting 1971-1974
- University of Nebraska, MA, Accounting 1969 – 1971
- University of Nebraska, BA, Accounting 1965 - 1969

Business Background Preceding Five Years:

- ROKA Wealth Strategists, LLC 06/2006 to Present
- Triad Advisors, Inc., 06/2006 to Present
- H&R Block Financial Advisors 10/2003 – 06/2006
- Quantum Financial Strategists, 01/2002 – 09/2003

Certifications:

- Certified Public Accountant (CPA) in the state of Georgia.

Certified Public Accountant ('CPA'): Requirements vary by state, but in general, in order to sit for the CPA exam, applicants must have a bachelor's degree with 120 semester hours. To obtain the CPA designation, applicants must pass the Uniform CPA Exam, gain relevant work experience and meet additional educational requirements. Overall, additional educational requirements usually consist of 24-30 semester hours in accounting, earned through a graduate or bachelor's degree in business. Many states also require a minimum number of one to two years accounting and/or auditing experience. A CPA license usually takes about 18 months to complete beyond the educational requirements.

No continuing professional education ("CPE") is required for CPA's during the first year of licensure. If the license was issued in an even-numbered year, 40 hours of CPE are required to renew the license the following year. Eight of the 40 hours must be in auditing and accounting subjects. After the first renewal period, the CPE requirement is 80 hours every two years. A minimum of 20 hours must be earned in each year. Sixteen of the 80 hours must be obtained in auditing and accounting subjects.

Disciplinary Information

Ms. March and Dr. Roemmich do not have any disciplinary information.

Other Business Activities

In their capacity as a registered representative of Triad Advisors, Inc., Ms. March and Mr. Roemmich receive commissions-based compensation in connection with the purchase and sale of securities, which may include 12b-1 fees. The receipt of commission-based compensation can present a conflict of interest because persons providing investment advice on behalf of our firm who are registered representatives have an incentive to effect securities transactions for the purpose of generating commissions rather than solely based on your needs.

Ms. March and Dr. Roemmich also earns commission-based compensation for selling insurance products. This practice presents a conflict of interest because persons providing investment advice on behalf of our firm who are insurance agents have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you should be advised that insurance products recommended are designed to complement the advisory services provided, and you are under no obligation to purchase any insurance products that they recommend. Ms. March and Dr. Roemmich hold an insurance license in the states of Georgia, Florida, North Carolina and Illinois.

Additional Compensation

Dr. Roemmich is also a CPA and may offer you tax advice in this separate capacity. ROKA Wealth Strategists, LLC advisory services and fees are separate and in addition to tax fees charged by Dr. Roemmich. You are under no obligation, contractually or otherwise, to use Dr. Roemmich's tax advice.

Supervision

Ms. March is the Principal and Chief Compliance Officer of ROKA Wealth Strategists, LLC. Ms. March is responsible for the supervision of the RIA and its IAR's.