

Part 2B of Form ADV: *Brochure Supplement*

Stephen Mertz

Sagent|Wealth Management

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This brochure supplement provides information about Stephen Mertz that supplements the Sagent Wealth Management brochure. You should have received a copy of that brochure. Please contact Iris Datzman if you did not receive Sagent Wealth Management's brochure or if you have any questions about the contents of this supplement.

Additional information about Stephen Mertz is available on the SEC's website at www.adviserinfo.sec.gov

Item 1 Educational, Background and Business Experience

Full Legal Name: Stephen Mertz

Born: 1976

Education

- Bucknell University; Bachelors of Science, Mechanical Engineering; 1998

Business Experience

- Sagent Wealth Management; Financial Advisor; from 09/2009 to Present
- Purshe Kaplan Sterling Investments; Registered Representative; from 03/2010 to Present
- UBS Financial Services; Financial Advisor; from 11/2007 to 9/2009
- R.F. MacDonald Company; Sales Engineer; from 04/2000 to 11/2007

Item 2 Disciplinary Information

Stephen Mertz has no reportable disciplinary history.

Item 3 Other Business Activities

A. Investment-Related Activities

1. Stephen Mertz is also engaged in the following investment-related activities:

- Registered representative of a broker-dealer, Purshe Kaplan Sterling Investments
 - Purshe Kaplan Sterling Investments is an unaffiliated Broker/Dealer with which Mr. Mertz is a registered representative.
 - Mr. Mertz's affiliation with Purshe Kaplan Sterling Investments does cause the potential for a conflict of interest. This potential conflict is addressed through review of accounts held away from Sagent's management, and a discussion of the application of Mr. Mertz's fiduciary duty to those assets. Mr. Mertz is also subject to surprise audits of any and all managed assets, both on behalf of the Broker/Dealer and Sagent Wealth Management.
 - Mr. Mertz may earn commission on sales of securities sold to brokerage clients through Purshe Kaplan Sterling Investments. These commissions would not be related in any way to revenue fees earned on accounts managed by Sagent Wealth Management.

B. Non Investment-Related Activities

Mr. Mertz is also the owner and president of a California Corporation, Mertz Enterprises Inc. The company provides manufacturing representative services for original equipment manufacturers in the Industrial and Commercial HVAC space. Company may also provide other services including, but not limited to, engineering services, field services and other related services.

This outside activity does not cause any conflict of interest or interfere with Mr. Mertz's commitment to Sagent Wealth Management.

Item 4 Additional Compensation

Stephen Mertz does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Item 5 Supervision

Supervisor: Marshall G. Eichenauer, Jr.

Title: Owner/Managing Partner

Phone Number: (949) 756-2226