



8283 N. Hayden Rd., Ste 249
Scottsdale, AZ 85258
t (480) 264-6070
f (480) 264-6149

Brochure Supplement

Richard K. Shields, CFP
Jenna R. Thornton, AAMS
Odell Berry, ChFC

Purpose of the Brochure Supplement

This *Brochure Supplement* provides information about Richard K. Shields, Jenna R. Thornton and Odell Berry which supplements the Synergy Financial Group of Arizona, LLC, (SFG) *Firm Brochure* document. Please contact SFG at info@synergyfinancialgroupaz.com if you have any questions about the contents of this *Brochure Supplement*.

Additional information about Richard, Jenna and Odell is available on the Arizona Corporation Commission's website at www.azcc.gov/divisions/securities. The CRD number for Richard is 1014307, Jenna's 4582260, and Odell's 1058895.

PLEASE NOTE: While SFG may refer to itself as a "registered investment advisor" or "RIA" you should be aware that registration itself does not imply any level of training.

Educational and Business Background

Richard K. Shields, CFP (b. 1945)

Formal Education After High School:

B.S. Business, Northern Arizona University, 1967

Business Background Preceding Five Years:

DeWaay Financial Network, 2010–Present

The Planning Group of Scottsdale, LLC, Senior Planning Consultant, 2005-2010

Meridian United Capital, LLC, Registered Representative, 2005-2010

HSL Financial Group, LLC, Managing Member, 2004-2005

Designations:

Certified Financial Planner (CFP)

Jenna R. Thornton (b. 1980)

Formal Education After High School:

A.A. Financial Services, Axia College of The University of Phoenix, 2010

Business Background Preceding Five Years:

DeWaay Financial Network, 2010–Present

The Planning Group of Scottsdale, LLC, Financial Consultant, 2005-2010

Meridian United Capital, LLC, Registered Representative, 2005-2010

Summer Wealth Management, Operations Manager, Financial Consultant, 2003-2005

Designations:

Accredited Asset Management Specialist (AAMS), 2007

Odell Berry, Jr. (b. 1955)

Formal Education After High School:

B.S. Psychology, Olivet Nazarene University, 1977

B.S. Physical Education, Olivet Nazarene University, 1977

Business Background Preceding Five Years:

DeWaay Financial Network, 2010–Present

Ives Asset Management, 2007-2010

Farmers Financial Solutions, 2005-2007

Designations:

Chartered Financial Consultant (ChFC), 1988

Disciplinary Information

Richard K. Shields, Jenna R. Thornton and Odell Berry have had no legal or disciplinary events in their past. You and prospective clients can view the CRD records (registration records) for these individual through the FINRA's BrokerCheck database online at www.finra.org/brokercheck using the CRD numbers previously provided.

Other Business Activities

In addition to being an investment adviser representative of SFG, Richard K. Shields also is a Managing Member of BFE Real Estate, LLC, (BFE). Richard makes recommendations on the real estate investments for BFE and these recommendations do not impose any conflicts with you.

Richard K. Shields and Jenna R. Thornton are also managing members of Synergy Accounting Solutions, LLC, (SAS). Jenna consults and prepares tax returns/documents for individuals and their families. These activities do not impose any conflict with you.

In addition to being investment adviser representative of SFG, Odell Berry has no other outside business activities.

Additional Compensation

Richard K. Shields is not monetarily compensated for his participation with BFE Real Estate, LLC.

Jenna R. Thornton is compensated on a per case basis in her activities involving SAS clients. This compensation in no way imposes any conflict with you.

Supervision

As Senior Managing Member of SFG, Richard K. Shields is primarily responsible for supervision of SFG and its Investment Adviser Representatives, (IAR). As Richard is an IAR himself, his accounts are also reviewed by Jenna R. Thornton, a Managing Member of SFG. The overall investment philosophy and investment strategy as outlined in SFG's Regular Discretionary Investment Advisory Agreement is reviewed by Richard. Both Richard and Jenna also review accounts as a whole each quarter in conjunction with the calculation of advisory fees.

Disclosure of Bankruptcy or administrative proceeding

No disclosure

If you have any questions regarding the enclosed information you may contact either Richard or Jenna directly.

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| Richard K. Shields, Senior Managing Member | (480) 264-6070 |
| Jenna R. Thornton, Managing Member | (480) 264-6070 |