

## Brochure Supplement



### Todd David Flynn

Soundmark Wealth Management, LLC

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Brochure last updated: March 31, 2015

This brochure supplement provides information about Todd David Flynn that supplements the Soundmark Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Joyce Bloomquist, Chief Compliance Officer, if you did not receive the Soundmark Wealth Management, LLC brochure or if you have any questions about the contents of this supplement. Additional information about Todd Flynn is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

### Educational Background and Business Experience

Todd Flynn was born in 1967. He attended University of Washington from where he earned a Bachelor of Arts degree in Accounting and Finance in 1990. He earned his Master of Science in Taxation from Golden Gate University in 1995.

Todd Flynn is a CPA (Certified Public Accountant) licensed in the state of Washington. The CPA designation is issued by the Washington State Board of Accountancy. A CPA candidate must meet specific education and experience requirements. CPA candidates must also pass a four part examination, in addition to an ethics exam. CPAs must complete 120 hours of continuing education every three years.

Mr. Flynn is also a CFP® (Certified Financial Planner). The CFP designation is issued by the Certified Financial Planner Board of Standards, Inc. A CFP candidate must have a bachelor's degree or higher from an accredited college or university, and 3 years full-time personal financial planning experience. The candidate must complete a CFP-board registered program or hold one of the following: CPA, ChFC, CLU, CFA, Ph.D. in business or economics, Doctor of Business Administration or an Attorney's License. CFP candidates must pass the CFP Certification Examinations. To maintain the designation he must attend at least 30 hours of continuing education every two years.

### Business Experience:

- Soundmark Wealth Management, LLC (formerly Sagemark Wealth Management, LLC), 2008 to present, Lead Advisor and Principal
- Pacific Asset Management, LLC, 2002 to 2008, Investment Advisor Representative
- Martin, Bircher, Buller & Flynn, P.C., 1990 to 2012, Certified Public Accountant

### Disciplinary Information

Registered investment advisors are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. Todd has no legal or disciplinary events related to the financial services industry.

### Other Business Activities

Mr. Flynn spends 100% of his time devoted to the practice of investment advisory services.

Mr. Flynn may also act as an insurance agent.

### Additional Compensation

Mr. Flynn's compensation comes primarily from Soundmark Wealth Management, LLC and is in part based upon the number of clients and size of accounts that he services. He does not receive compensation from non-clients for providing advisory services.

Todd Flynn is also licensed as an insurance agent. As an insurance agent he will receive compensation usually based upon the size (premium amount) and/or type of insurance product. Because the commission compensation varies between investment options, Mr. Flynn has a financial incentive to recommend one insurance product over another. This financial incentive creates a potential conflict of interest between you, Mr. Flynn and Soundmark Wealth Management, LLC.

## Supervision

Soundmark Wealth Management, LLC supervises its investment advisor representatives through a system of internal control procedures overseen by our Chief Compliance Officer, Joyce Bloomquist. This oversight includes a review of client portfolios, investment advisor representative personal securities transactions, and correspondence. You can reach her at 425-820-1769.

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## Brochure Supplement



### William (Bill) Joseph Schultheis

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Brochure last updated: March 31, 2015

This brochure supplement provides information about William Joseph Schultheis that supplements the Soundmark Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Joyce Bloomquist, Chief Compliance Officer, if you did not receive the Soundmark Wealth Management, LLC brochure or if you have any questions about the contents of this supplement. Additional information about Bill Schultheis is available on the SEC's website at [www.advisorinfo.sec.gov](http://www.advisorinfo.sec.gov).

## Educational Background and Business Experience

Bill Schultheis was born in 1960. He attended Washington State University from 1978 to 1980, and attended Texas A & M University from 1980 to 1983 where he earned a Bachelor of Science degree in Agriculture Economics.

### Business Experience:

- Soundmark Wealth Management, LLC (formerly Sagemark Wealth Management, LLC), 2008 to present, Lead Advisor and Principal
- Pacific Asset Management, LLC, 2000 to 2008, Investment Advisor Representative
- Inter-Pacific Investors, 1998 to 2000, Investment Advisor Representative
- Smith Barney, 1983 to 1998, Investment Advisor Representative

## Disciplinary Information

Registered investment advisors are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. Bill has no legal or disciplinary events related to the financial services industry.

## Other Business Activities

Mr. Schultheis spends 100% of his time devoted to the practice of investment advisory services.

## Additional Compensation

Mr. Schultheis's compensation comes primarily from Soundmark Wealth Management, LLC and is in part based upon the number of clients and size of accounts that he services. He does not receive compensation from non-clients for providing advisory services.

## Supervision

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## Brochure Supplement



### John Edward Buller

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Brochure last updated: March 31, 2015

This brochure supplement provides information about John Edward Buller that supplements the Soundmark Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Joyce Bloomquist, Chief Compliance Officer, if you did not receive the Soundmark Wealth Management, LLC brochure or if you have any questions about the contents of this supplement. Additional information about John Buller is available on the SEC's website at [www.advisorinfo.sec.gov](http://www.advisorinfo.sec.gov).

### Educational Background and Business Experience

John Buller was born in 1961. He attended the University of Washington where he earned a Bachelor of Arts degree in Business Administration in 1985.

John Buller is a CPA (Certified Public Accountant) licensed in the state of Washington. The CPA designation is issued by the Washington State Board of Accountancy. A CPA candidate must meet specific education and experience requirements. CPA candidates must also pass a four part examination, in addition to an ethics exam. CPAs must complete 120 hours of continuing education every three years.

#### Business Experience:

- Soundmark Wealth Management, LLC (formerly Sagemark Wealth Management, LLC), 2002 to present, Lead Advisor and Principal
- Pacific Asset Management, LLC, 2002 to 2008, Investment Advisor Representative
- Martin, Bircher, Thompson, P.C., 1988 to present, Certified Public Accountant

### Disciplinary Information

Registered investment advisors are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. John has no legal or disciplinary events related to the financial services industry.

### Other Business Activities

Mr. Buller spends 100% of his time devoted to the practice of investment advisory services.

### Additional Compensation

Mr. Buller's compensation comes primarily from Soundmark Wealth Management, LLC and is in part based upon the number of clients and size of accounts that he services. He does not receive compensation from non-clients for providing advisory services.

### Supervision

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## Brochure Supplement



### Kaliko Michelle Veiseh

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Telephone: 425-284-4343

### Home Office

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Brochure last updated: March 31, 2015

This brochure supplement provides information about Kaliko Michelle Veiseh that supplements the Soundmark Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Joyce Bloomquist, Chief Compliance Officer, if you did not receive the Soundmark Wealth Management, LLC brochure or if you have any questions about the contents of this supplement. Additional information about Kaliko Veiseh is available on the SEC's website at [www.advisorinfo.sec.gov](http://www.advisorinfo.sec.gov).

### Educational Background and Business Experience

Kaliko Veiseh was born in 1979. She attended the University of Washington where she earned a Bachelor of Arts degree in Business Administration, with a Finance and Management concentration, in 2006.

Ms. Veiseh is also pursuing a CFP® (Certified Financial Planner) designation. The CFP designation is issued by the Certified Financial Planner Board of Standards, Inc. A CFP candidate must have a bachelor's degree or higher from an accredited college or university, and three years of full-time personal financial planning experience. The candidate must complete a CFP-board registered program or hold one of the following: CPA, ChFC, CLU, CFA, Ph.D. in business or economics, Doctor of Business Administration or an Attorney's license. CFP candidates must pass the CFP Certification Examinations. To maintain the designation, she must attend at least 30 hours of continuing education every two years.

### Business Experience:

- Soundmark Wealth Management, LLC (formerly Sagemark Wealth Management, LLC), 2008 to present, Associate Advisor
- Pacific Asset Management, LLC, 2003 to 2008, Client Services, Advisor Representative

### Disciplinary Information

Registered investment advisors are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. Kaliko has no legal or disciplinary events related to the financial services industry.

### Other Business Activities

Kaliko Veiseh does not have business activities outside of Soundmark Wealth Management, LLC.

### Additional Compensation

Ms. Veiseh's compensation comes solely from Soundmark Wealth Management, LLC and is in part based upon the number of clients and size of accounts that she services. She does not receive compensation from non-clients for providing advisory services.

### Supervision

Soundmark Wealth Management, LLC supervises its investment advisor representatives through a system of internal control procedures overseen by our Chief Compliance Officer, Joyce Bloomquist. This oversight includes a review of client portfolios, investment advisor representative personal securities transactions, and correspondence. You can reach her at 425-820-1769.

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## Brochure Supplement



### Joyce Virginia Bloomquist

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Brochure last updated: March 31, 2015

This brochure supplement provides information about Joyce Virginia Bloomquist that supplements the Soundmark Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Joyce Bloomquist, Chief Compliance Officer, if you did not receive the Soundmark Wealth Management, LLC brochure or if you have any questions about the contents of this supplement. Additional information about Joyce Bloomquist is available on the SEC's website at [www.advisorinfo.sec.gov](http://www.advisorinfo.sec.gov).

### Educational Background and Business Experience

Joyce Bloomquist was born in 1971. She attended Washington State University from 1990-1994 where she studied Business and Merchandising.

#### Business Experience:

- Soundmark Wealth Management, LLC (formerly Sagemark Wealth Management, LLC), 2008 to present, Chief Compliance Officer, Associate Advisor
- Pacific Asset Management, LLC, 2002 to 2008, Investment Advisor Representative, Client Services
- Buyonet, 1999-2002, Account Manager
- Federated Department Stores 1996-1999, Buyer

### Disciplinary Information

Registered investment advisors are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. Joyce has no legal or disciplinary events related to the financial services industry.

### Other Business Activities

Ms. Bloomquist does not have business activities outside of Soundmark Wealth Management, LLC.

### Additional Compensation

Ms. Bloomquist's compensation comes solely from Soundmark Wealth Management, LLC and is in part based upon the number of clients and size of accounts that she services. She does not receive compensation from non-clients for providing advisory services.

### Supervision

Soundmark Wealth Management, LLC supervises its investment advisor representatives through a system of internal control procedures overseen by our Chief Compliance Officer, Joyce Bloomquist. Ms. Bloomquist's personal activities are overseen by the firm's principals, Bill Schultheis, Todd Flynn or John Buller.

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## Brochure Supplement



### James Francis Nevers

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Brochure last updated: March 31, 2015

This brochure supplement provides information about James Francis Nevers that supplements the Soundmark Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Joyce Bloomquist, Chief Compliance Officer, if you did not receive the Soundmark Wealth Management, LLC brochure or if you have any questions about the contents of this supplement.

### Educational Background and Business Experience

James Nevers was born in 1987. He attended University of Washington from where he earned a Bachelor of Arts degree in Business Administration-Finance in 2010. He earned his Master of Science in Personal Financial Planning from Texas Tech University in 2012.

James Nevers is also a U.S. Army Officer in the Washington State National Guard. He has served as an Air Defense Airspace Management Officer and a Combat Engineer Platoon Leader.

Mr. Nevers is also pursuing a CFP® (Certified Financial Planner) designation and has passed the CFP exam in March, 2013. The CFP designation is issued by the Certified Financial Planner Board of Standards, Inc. A CFP candidate must have a bachelor's degree or higher from an accredited college or university, and three years of full-time personal financial planning experience. The candidate must complete a CFP-board registered program or hold one of the following: CPA, ChFC, CLU, CFA, Ph.D. in business or economics, Doctor of Business Administration or an Attorney's license. CFP candidates must pass the CFP Certification Examinations. To maintain the designation, he must attend at least 30 hours of continuing education every two years.

#### Business Experience:

- Soundmark Wealth Management, LLC (formerly Sagemark Wealth Management, LLC), 2012 to present, Associate Advisor.

### Disciplinary Information

Registered investment advisors are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. James has no legal or disciplinary events related to the financial services industry.

### Other Business Activities

James Nevers does not have business activities outside of Soundmark Wealth Management, LLC.

### Additional Compensation

Mr. Nevers's compensation comes primarily from Soundmark Wealth Management, LLC and is in part based upon the number of clients and size of accounts that he services. He does not receive compensation from non-clients for providing advisory services.

### Supervision

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## Brochure Supplement



### Gayl Marie Dorcas

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Brochure last updated: March 31, 2015

This brochure supplement provides information about Gayl Dorcas that supplements the Soundmark Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Joyce Bloomquist, Chief Compliance Officer, if you did not receive the Soundmark Wealth Management, LLC brochure or if you have any questions about the contents of this supplement.

### Educational Background and Business Experience

Gayl Dorcas was born in 1958. She joined the financial industry in 2005, providing client service and facilitating account management and operations. With over 20 years of experience working with Eastside area CPA firms, Gayl brings a wealth of firm administration and office management experience to Soundmark.

#### Business Experience:

- Soundmark Wealth Management, LLC (formerly Sagemark Wealth Management, LLC), 2008 to present, Client Service Associate
- Martin Bircher Buller & Flynn PC, 2005 to 2007, Client Service Associate
- Jacque Bates MS CPA, 2001-2005, Office Manager / Administrator
- Dental Group, LLC / Martin, PC, 1992-2001, Office Manager / Administrator
- Martin/Grambush, PC, 1986-1992, Administrative Support
- Pacific Rainier Roofing, Inc., 1979-1984, Administrative Support

### Disciplinary Information

Registered investment advisors are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. Gayl has no legal or disciplinary events related to the financial services industry.

### Other Business Activities

Gayl Dorcas does not have business activities outside of Soundmark Wealth Management, LLC.

### Additional Compensation

Ms. Dorcas's compensation comes solely from Soundmark Wealth Management, LLC and is in part based upon the number of clients and size of accounts that she services. She does not receive compensation from non-clients for providing advisory services.

### Supervision

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## Brochure Supplement



### **Therese Elizabeth Mille**

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Brochure last updated: March 31, 2015

This brochure supplement provides information about Therese Elizabeth Mille that supplements the Soundmark Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Joyce Bloomquist, Chief Compliance Officer, if you did not receive the Soundmark Wealth Management, LLC brochure or if you have any questions about the contents of this supplement.

### **Educational Background and Business Experience**

Therese Mille was born in 1967. She attended Villanova University where she earned a Bachelor of Arts degree in Human Services with a minor in Sociology in 1991.

#### Business Experience:

- Soundmark Wealth Management, LLC (formerly Sagemark Wealth Management, LLC), 2011, Client Service Associate
- Janet G. Palmatier, CFP, 2009 to 2011, Client Service Associate
- The Vanguard Group, 1987 to 1998, Supervisor, Project Manager, Brokerage Services

### **Disciplinary Information**

Registered investment advisors are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. Therese has no legal or disciplinary events related to the financial services industry.

### **Other Business Activities**

Therese Mille does not have business activities outside of Soundmark Wealth Management, LLC.

### **Additional Compensation**

Ms. Mille's compensation comes solely from Soundmark Wealth Management, LLC and is in part based upon the number of clients and size of accounts that she services. She does not receive compensation from non-clients for providing advisory services.

### **Supervision**

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## Brochure Supplement



### Julie Tyann Klingler

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[www.coffeehouseinvestor.com](http://www.coffeehouseinvestor.com)  
Brochure last updated: March 31, 2015

This brochure supplement provides information about Julie Tyann Klingler that supplements the Soundmark Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Joyce Bloomquist, Chief Compliance Officer, if you did not receive the Soundmark Wealth Management, LLC brochure or if you have any questions about the contents of this supplement.

### Educational Background and Business Experience

Julie Klingler was born in 1978. She attended the University of Idaho where she earned a Bachelor of Science and Master of Science degree in Sports Science in 2001.

#### Business Experience:

- Soundmark Wealth Management, LLC (formerly Sagemark Wealth Management, LLC), 2010 to present
- The Coffeehouse Investor Marketing Director 2010 to present
- PRO Sports Club, 2001-2009, 20/20 Lifestyles Director, Personal Trainer

### Disciplinary Information

Registered investment advisors are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. Julie has no legal or disciplinary events related to the financial services industry.

### Other Business Activities

Ms. Klingler does not have business activities outside of Soundmark Wealth Management, LLC.

### Additional Compensation

Ms. Klingler's compensation comes solely from Soundmark Wealth Management, LLC, and is in part based upon the number of clients and size of accounts that she services. She does not receive compensation from non-clients for providing advisory services.

### Supervision

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## Brochure Supplement



### John Christopher D'Amelio

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Brochure last updated: March 31, 2015

This brochure supplement provides information about John D'Amelio that supplements the Soundmark Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Joyce Bloomquist, Chief Compliance Officer, if you did not receive the Soundmark Wealth Management, LLC brochure or if you have any questions about the contents of this supplement. Additional information about John D'Amelio is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

### Educational Background and Business Experience

John D'Amelio was born in 1986. He attended the University of Washington from 2005 to 2007, and is currently finishing his BA in Finance through Cascadia and the University of Washington Bothell.

#### Business Experience:

- Soundmark Wealth Management, LLC (formerly Sagemark Wealth Management, LLC), 2014 to present, Associate Advisor
- Inglewood Golf Club, 2010-2013, PGA Assistant Golf Professional

### Disciplinary Information

Registered investment advisors are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. John has no legal or disciplinary events related to the financial services industry.

### Other Business Activities

Mr. D'Amelio does not have business activities outside of Soundmark Wealth Management, LLC.

### Additional Compensation

Mr. D'Amelio's compensation comes primarily from Soundmark Wealth Management, LLC and is in part based upon the number of clients and size of accounts that he services. He does not receive compensation from non-clients for providing advisory services.

### Supervision

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## Brochure Supplement



### Elizabeth (Liz) Ann McQueen

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Brochure last Updated: March 31, 2015

This brochure supplement provides information about Elizabeth Ann McQueen that supplements the Soundmark Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Joyce Bloomquist, Chief Compliance Officer, if you did not receive the Soundmark Wealth Management, LLC brochure or if you have any questions about the contents of this supplement.

### Educational Background and Business Experience

Elizabeth McQueen was born in 1965. She attended Reigate College in the United Kingdom where she studied Finance. Liz holds her series 7 and 66 licenses as well as being a CRPC®. Individuals who hold the CRPC® designation have completed a course of study encompassing pre-and post-retirement needs, asset management, estate planning and the entire retirement planning process using models and techniques from real client situations. Additionally, individuals must pass an end-of-course examination that tests their ability to synthesize complex concepts and apply theoretical concepts to real-life situations.

All designees have agreed to adhere to [Standards of Professional Conduct](#) and are subject to a disciplinary process.

Designees renew their designation every two-years by completing 16 hours of continuing education, reaffirming adherence to the Standards of Professional Conduct and complying with self-disclosure requirements.

#### Business Experience:

- Soundmark Wealth Management, LLC (formerly Sagemark Wealth Management, LLC), 2015 to present, Client Service Associate
- Coldstream Capital Management, LLC 2012 to 2015, Client Service Associate.
- Jill A Murphy, CRPC, 2008 to 2011, Client Service Associate.

Prior to moving to the USA in 2000, Elizabeth worked for over 12 years with a number of large Investment Banks in London including Merrill Lynch and Schroders.

### Disciplinary Information

Registered investment advisors are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. James has no legal or disciplinary events related to the financial services industry.

### Other Business Activities

Elizabeth McQueen does not have business activities outside of Soundmark Wealth Management, LLC.

### Additional Compensation

Mrs. McQueen's compensation comes primarily from Soundmark Wealth Management, LLC and is in part based upon the number of clients and size of accounts that he services. He does not receive compensation from non-clients for providing advisory services.

### Supervision

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