



Part 2B of Form ADV Disclosure Brochure

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This brochure supplement provides information about Jennifer E. Myers, Michael Fuhr, and Ryan Phillips. It supplements SageVest's accompanying Form ADV brochure. You should have received a copy of that brochure. Please contact SageVest's Chief Compliance Officer, Jennifer E. Myers at 703-992-7650 if you have any questions about the Form ADV brochure or this supplement, or if you would like to request additional or updated copies of either document.

Additional information about Jennifer E. Myers, Michael Fuhr, and Ryan Phillips is available on the SEC's website at www.adviserinfo.sec.gov.

Key Employee Biographical Information

Education and Business Standards

SageVest requires individuals involved in determining or giving investment advice to clients to have appropriate educational credentials and experience, including:

1. Have work experience that demonstrates their aptitude for financial planning and investment management.
2. Be a graduate of an accredited four-year college.
3. Hold the Series 65 Investment Adviser Representative license or its equivalent.
4. Hold or be pursuing one of the following designations: Certified Financial Planner™ (CFP®), Chartered Financial Consultant® (ChFC®), Certified Financial Analyst (CFA), or Certified Public Accountant (CPA).
5. Subscribe to the Code of Ethics of the CFP Board of Standards.
6. Be properly licensed for all advisory activities in which they are engaged.

Professional Certifications

Our advisors have earned certifications and credentials that are required to be explained in further detail. We have listed the certifications and credentials held by our investment advisors and financial planners below:

CERTIFIED FINANCIAL PLANNER™ (CFP®): To attain the right to use CFP® marks, an individual must satisfactorily fulfill the following requirements:

- Education – Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board's studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a Bachelor's Degree from an accredited college or university. CFP Board's financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning and estate planning
- Examination – Pass the comprehensive 10-hour CFP® Certification Exam
- Experience – Complete at least three years of full-time financial planning-related experience
- Ethics – Agree to be bound by CFP Board's *Standards of Professional Conduct*.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- Continuing Education – Complete 30 hours of continuing education hours every two years, including two hours on the *Code of Ethics* and other parts of the *Standards of Professional Conduct*
- Ethics – Renew an agreement to be bound by the *Standards of Professional Conduct*

Jennifer E. Myers, CFP[®], President, Investment Committee Chair, Chief Compliance Officer

Jennifer E. Myers, CFP[®] serves as President of SageVest. With more than two decades of experience in the financial industry, Jennifer works with clients to help them fulfill their life and family goals, while translating complex financial matters into understandable, manageable and successful strategies. She serves as Chair of the firm's Investment Committee and maintains close working relationships with clients to ensure that investment portfolios and broader financial objectives remain closely aligned.

Jennifer has repeatedly been named as a Top Fee-Only Advisor by The Washingtonian and Northern Virginia Magazine, and as a Five Star Wealth Manager by Five Star Professionals. (Please see our website for award disclosures.) She has appeared on television and has been quoted in The Washington Post, CNBC, US News and World Report, Investopedia, Yahoo Finance, CNN Money, NASDAQ, NPR's 'Marketplace', The Journal of Financial Planning, and a host of other national publications. Jennifer has also spoken on a variety of financial planning topics ranging from broad planning initiatives to more discrete topics such as wealth transfer planning, financial values, children and money, and women's financial planning considerations.

Her professional affiliations include membership in the Financial Planning Association and the Washington, DC Estate Planning Council, of which she previously served as an officer and director, among other positions within the Council. In the community, she has been a member of the Women's Business Giving Circle at the Community Foundation for Northern Virginia and the Washington Women's Leader Initiative. She also previously tutored inner-city children at Project Northstar.

Prior to establishing SageVest, Jennifer served as partner and vice president of Freed Myers, a wealth management firm in Chevy Chase, MD. She also provided financial and business analysis for Unisys and the U.S. Postal Service.

Jennifer was born in Stoughton, MA in 1972, and currently resides in McLean, VA. She received her Bachelors in Business Administration (BBA) and Masters in Business Administration (MBA) from The George Washington University. She also received the Certified Financial Planner (CFP[®]) professional designation from the CFP Board of Standards.

Disciplinary Information

Ms. Myers has not been involved in any legal or disciplinary events.

Other Business Activities

Ms. Myers is not engaged in any other investment related business, and does not receive compensation in connection with any business activity outside of SageVest.

Additional Compensation

Ms. Myers does not receive economic benefits from any person or entity other than SageVest.

Supervision

Ms. Myers conducts supervision of all activities conducted by SageVest. Like all employees of SageVest Wealth Management, Ms. Myers is required to follow the supervisory guidelines and procedures manual, which is designed to ensure compliance with applicable security laws.

Michael Fuhr, CFP[®], Financial Advisor, Investment Committee Co-Chair, Chief Operating Officer

As a lead financial advisor, Michael Fuhr, CFP[®] offers more than a decade of experience as a financial advisor. He works closely with clients to develop coordinated investment and planning strategies that support their personal and financial success. Michael listens and evaluates the complex and interrelated investment and financial planning variables that are unique to each client, then formulates client strategies that incorporate real solutions within a true wealth management approach. He is also a thought-leader on financial planning strategies, helping to support client objectives.

Michael co-chairs the Investment Committee, helping to identify investment and portfolio management initiatives. Additionally, he acts as the company's Chief Operating Officer, integrating research, planning and client-servicing efforts in support of our company's and clients' objectives.

As a senior member of the team, Michael has the authority to assume responsibilities for the firm's operations and act as the interim Chief Compliance Officer, should the need arise.

Michael is active in the professional community, as a member of the Financial Planning Association (FPA) and the McLean Estate Planning Council. He has been quoted by *Forbes*, *US News and World Report* and CNBC.

Prior to joining SageVest, Michael held advisory positions with Best Wise Associates and Goodstein Financial, both California-based financial firms. He also worked in the motion picture industry before entering financial services.

Michael was born in Philadelphia, PA in 1974, and currently resides in Clifton, VA. He graduated from the Pennsylvania State University with a Bachelor of Arts (BA) in Communications and later received the Certified Financial Planner (CFP[®]) professional designation from the CFP Board of Standards.

Disciplinary Information

Mr. Fuhr has not been involved in any legal or disciplinary events.

Other Business Activities

Mr. Fuhr is not engaged in any other investment related business, and does not receive compensation in connection with any business activity outside of SageVest.

Additional Compensation

Mr. Fuhr does not receive economic benefits from any person or entity other than SageVest.

Supervision

Mr. Fuhr's investment recommendations are reviewed by Jennifer Myers. Ms. Myers can be reached by calling the telephone number on the cover of this brochure supplement. All employees of SageVest Wealth Management are required to follow the supervisory guidelines and procedures manual, which is designed to ensure compliance with applicable security laws.

Ryan C. Phillips, CFP[®], Financial Advisor

Ryan Phillips, CFP[®], is actively involved in client relationships, with regard to investment, planning and client servicing needs. As a CERTIFIED FINANCIAL PLANNER[™], Ryan works with clients to formulate successful wealth strategies that incorporate the totality of their financial and life objectives.

In support of SageVest's commitment to connecting families with their wealth, Ryan is an advocate of financial learning. He regularly contributes to financial publications and conducts educational money management workshops for clients' family members.

Ryan is an integral member of our investment team. He coordinates Investment Committee efforts by researching investment opportunities, monitoring existing strategies, and conducting ongoing client portfolio reviews in accordance with committee guidelines. He also manages portfolio reporting functions.

Ryan is an active member of the Financial Planning Association.

Prior to joining SageVest, Ryan served as an Investment Advisory Associate at Fairman Group Family Office, located in Pennsylvania.

Ryan was born in Fairfax, VA in 1988 and currently resides in Arlington, VA. He graduated from Virginia Polytechnic Institute and State University with a Bachelor of Science (BS) in Finance, Insurance & Business Law and later received the Certified Financial Planner (CFP[®]) professional designation from the CFP Board of Standards.

Disciplinary Information

Mr. Phillips has not been involved in any legal or disciplinary events.

Other Business Activities

Mr. Phillips is not engaged in any other investment related business, and does not receive compensation in connection with any business activity outside of SageVest.

Additional Compensation

Mr. Phillips does not receive economic benefits from any person or entity other than SageVest.

Supervision

Mr. Phillips's recommendations are reviewed by Michael Fuhr. Mr. Fuhr can be reached by calling the telephone number on the cover of this brochure supplement. All employees of SageVest Wealth Management are required to follow the supervisory guidelines and procedures manual, which is designed to ensure compliance with applicable security laws.