



REALTA WEALTH

Ross Brannon

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This Brochure Supplement provides information about Ross Brannon that supplements the Realta Investment Advisors, Inc. ("RIA")'s Brochure. You should have received a copy of that Brochure. Please contact Mr. Barrett Schultz at (888) 657-5200 if you did not receive RIA's Brochure or if you have any questions about the contents of this supplement.

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

ITEM 2- EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Ross F. Brannon was born in Atlanta, GA in 1977. He went to Florida State University where he received a degree in finance in 2000. Upon graduation, he began a career in real estate. He transitioned to finance in 2011 working with North Florida Financial in Tallahassee, FL for 12 years before transitioning to Realta Investments to focus on working with high-net-worth clients.

ITEM 3- DISCIPLINARY INFORMATION

Registered investment advisers 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. There are no legal or disciplinary event(s) to disclose. Additional information about your Financial Advisor is available at www.finra.org/brokercheck or www.adviserinfo.sec.gov.

ITEM 4- OTHER BUSINESS ACTIVITIES

Ross is licensed to sell securities through Realta Equities, Inc. ("REI"), a securities broker/dealer registered with the Financial Industry Regulatory Authority ("FINRA"). In this capacity, Ross may be involved in the sale of investment products such as securities, mutual funds and variable products. If an advisory client implements recommendations made by Ross by purchasing securities or other products through REI, Ross will receive additional compensation in the form of commissions, including 12b-1 fees for the sale of such products. Ross spends approximately 1% of his professional time in his sales capacities at REI.

Ross is also a licensed insurance agent. Ross may recommend insurance products to advisory clients. He is paid a commission for selling such products. He spends approximately 1% of his time in his capacity as an insurance agent.

ITEM 5- ADDITIONAL COMPENSATION

Aside from the activities discussed in Item 4 above, Ross receives no economic benefit from any non-client third party.

ITEM 6- SUPERVISION

Mr. Barrett Schultz (Chief Compliance Officer) and designated supervisors monitor the investment advisory activities, personal investing activities, and adherence to the Advisor's compliance program and code of ethics on a continuous basis using various methods, including periodic inspection and review of client securities positions and transaction activity, obtaining certifications of compliance with company policies and procedures from those supervised, and obtaining and reviewing brokerage statements or transactions and holdings reports of the supervised persons. Mr. Schultz can be reached at 888.657.5200.

As of January 2, 2024