



REALTA
WEALTH

Realta Investment Advisors, Inc.

Amy Widener

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Wilmington, DE 19801

888-657-5200

This Brochure Supplement provides information about Amy Widener 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 Amy Widener is available on the SEC's website at www.adviserinfo.sec.gov.

ITEM 2- EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Amy was born in 1960 and attended college at Temple University in Philadelphia, Pennsylvania where he received a Bachelor of Arts degree in Political Science in 1981. Upon graduation, she worked as a Registered Representative for Merrill Lynch in New York, New York. She worked as a Private Banker for Wells Fargo Private Bank from 1989 through 1999 and for SunTrust Bank as a Private Banker and Registered Representative from 1999 through 2003.

Amy also held a senior level management position with Morgan Stanley, as Director of Wealth Management, and has been a partner in several privately held corporations.

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

Amy 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, Amy 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 Amy by purchasing securities or other products through REI, Amy will receive additional compensation in the form of commissions, including 12b-1 fees for the sale of such products. Amy spends approximately 1% of her professional time in her sales capacities at REI.

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

ITEM 5- ADDITIONAL COMPENSATION

Aside from the activities discussed in Item 4 above, Amy 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