



**REALTA**  
**WEALTH**

Realta Investment Advisors, Inc.

Erik Somerville

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**This Brochure Supplement provides information about Erik Somerville 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 Erik Somerville is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

## ITEM 2- EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Erik Somerville was born in 1995 and attended college at Hobart and William Smith Colleges in Geneva, New York where he received a Bachelor of Arts degree in English in 2017. Upon graduation, Erik worked in the film and television industry in Los Angeles, California for 5 years. He worked part time for Somerville Investments for two years from 2021 through 2023, until moving full time to the advisory business in September of 2023.

Erik received his Series 65 license (passing this exam qualifies individuals as Investment Advisor Representatives) in December of 2022 and is currently working towards his Certified Financial Planner designation.

## 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](http://www.finra.org/brokercheck) or [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## ITEM 4- OTHER BUSINESS ACTIVITIES

There are no outside business activities.

## ITEM 5- ADDITIONAL COMPENSATION

Erik 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.