



# REALTA WEALTH

**Robert Marsh**

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**888.657.5200**

This Brochure Supplement provides information about Robert Marsh that supplements the Realty 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 Robert Marsh is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## ITEM 2- EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Robert Marsh was born in 1981 and attended College for Financial Planning in Centennial, Colorado where he earned an accreditation as a Wealth Management Advisor, and attended the University of South Florida in Tampa, Florida where he earned a degree in Finance. In 2011, Robert began working as a registered representative and investment advisor for Waddell & Reed as an associated person. In May 2016, Robert started his own business called Gulf Coast Advisors in Palm Harbor, Florida.

### AWMA® – Accredited Wealth Management Advisor

This professional designation is issued by the College for Financial Planning and is designed for advisors who want to better address the needs of high net worth clients. Candidates must complete an education module and pass a final exam. Sixteen hours of continuing education is required every two years to maintain the 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

Robert 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, Robert 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 Robert by purchasing securities or other products through REI, Robert will receive additional compensation in the form of commissions, including 12b-1 fees for the sale of such products. Robert spends approximately 10% of his professional time in his sales capacities at REI.

Robert is also a licensed insurance agent. Robert may recommend insurance products to advisory clients. He is paid a commission for selling such products. He spends approximately 25% of his time in his capacity as an insurance agent.

## ITEM 5- ADDITIONAL COMPENSATION

Aside from the activities discussed in Item 4 above, Robert 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.