



# REALTA WEALTH

**Gregg M. Somerville**

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**This Brochure Supplement provides information about Gregg Somerville 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 Gregg 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

Gregg Somerville was born in 1961 and attended college at Cornell University in Ithaca, New York where he received a Bachelor of Arts degree in Economics in 1983. Gregg began his career in the securities business at EF Hutton in 1985. Since that time Gregg has worked as a financial advisor for Merrill Lynch, Oppenheimer and Co., Prudential Securities, Alex Brown and Sons, Ferris Baker Watts and RBC Wealth Management (which acquired Ferris Baker). In April 2013 Gregg opened Somerville Investments.

Gregg is a Certified Financial Planner (CFP®). The CFP® designation is issued by the Certified Financial Planner Board of Standards, Inc. Prerequisites include a bachelor's degree or higher from an accredited college or university and three years of full-time personal financial planning experience or the equivalent part time experience. Candidates must complete a CFP-board registered program or hold another particular designation and pass a final exam. CFPs are required to complete 30 hours of continuing education every two years.

## 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

Gregg 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, Gregg 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 Gregg by purchasing securities or other products through REI, Gregg will receive additional compensation in the form of commissions, including 12b-1 fees for the sale of such products. Gregg spends approximately 20% of his professional time in his sales capacities at REI.

Gregg is also a licensed insurance agent. Gregg may recommend insurance products to advisory clients. He is paid a commission for selling such products. He spends approximately 10% of his time in his capacity as an insurance agent.

## ITEM 5- ADDITIONAL COMPENSATION

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