



REALTA
W E A L T H

Jason Douglas Konkier, CFP®

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This Brochure Supplement provides information about Jason Douglas Konkier, CFP® 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 Jason Douglas Konkier, CFP® is available on the SEC's website at www.adviserinfo.sec.gov.

ITEM 2- EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Jason Douglas Konskier, CFP® was born in 1987 and attended college at SUNY Binghamton where he received a Bachelor of Arts degree in Economics in 2009. Jason joined the Financial Services Industry In 2012 as a Registered Representative for Merrill Lynch in Montvale, New Jersey. He worked as a Financial Advisor at Merrill Lynch through 2020 and then for Wells Fargo Advisors through 2021 prior to joining Realta where he feels best positioned to help his clients with respect to their financial needs, goals, and desires.

The Certified Financial Planner (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 or www.adviserinfo.sec.gov.

ITEM 4- OTHER BUSINESS ACTIVITIES

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

ITEM 5- ADDITIONAL COMPENSATION

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