



# REALTA WEALTH

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

## ITEM 2- EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Noah D. Wertheimer was born in 1980 and attended college at University of Northern Colorado in Greeley, CO where he received a Master of Science degree in Kinesiology in 2005. Upon graduation, he started his career as a Financial Advisor for Morgan Stanley. In 2008, he worked as a Private Client Banker for JPMorgan Chase Bank, NA, and in 2010 was promoted to a Private Client Advisor with JPMorgan Securities.

## 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

Noah 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, Noah 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 Noah by purchasing securities or other products through REI, Noah will receive additional compensation in the form of commissions, including 12b-1 fees for the sale of such products. Noah spends approximately 60% of his professional time in his sales capacities at REI.

Noah is also a licensed insurance agent. Noah may recommend insurance products to advisory clients. He is paid a commission for selling such products. He spends approximately 20% of his time in his capacity as an insurance agent.

## ITEM 5- ADDITIONAL COMPENSATION

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