



REALTA
W E A L T H

Skip Massengill

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This Brochure Supplement provides information about Skip Massengill 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 Skip Massengill is available on the SEC's website at www.adviserinfo.sec.gov.

ITEM 2- EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Skip Massengill was born in 1959 and attended college at Villanova University in Villanova, Pennsylvania where he received a Bachelor of Arts degree in 1981. Skip served as a Financial Advisor at Robert W. Baird & Co., Inc. from 2009 until he joined Realta in 2017 and has over 35 years of financial services experience. His practice is largely focused on nonprofit endowments and board members.

Skip serves on the Executive Boards of Life Quest and POP Warner football and has served as co-chair of the PEPC Ethics Committee.

Skip has been a speaker for several notable industry groups including: The Federal Financial Institutions Examination Council (FFIEC), Pension & Investments, EACUBO, NAFCU, CPA- Alliance, SIA-Securities Industry Association at Wharton, and many Source Media conferences.

Skip has written articles for various publications, most notably: American Banker, Employee Benefit News and Bank Accounting & Finance. His commentary has been featured in national media outlets including TIME and Trust & Estates, as well as local Philadelphia syndications such as CBS 3 (KYW-TV) & FOX 29 (WTXF-TV). Skip has extensive radio experience and previously hosted a daily radio spot for over 7 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

Skip 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, Skip 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 Skip by purchasing securities or other products through REI, Skip will receive additional compensation in the form of commissions, including 12b-1 fees for the sale of such products. Skip spends approximately 50% of his professional time in his sales capacities at REI.

Skip is the founder of the Retirement Education Institute (REI) an unbiased web-based learning portal that will work extensively with employers to bring unbiased retirement education into the workplace and improve the financial literacy of employees surrounding their 401k / 403b plans.

ITEM 5- ADDITIONAL COMPENSATION

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