



REALTA WEALTH

Joel D. Orris

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

ITEM 2- EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Joel Orris was born in 1961 and attended the University of Delaware, where he received a Bachelor of Science in Accounting with a minor in Business Administration.

Joel has over 30 years' experience in financial services. Most recently, he worked at Wells Fargo Advisors Financial Network as a Financial Advisor from 2009 until joining Realta as Managing Partner of (DBA) CJE Financial in 2018.

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

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

Joel is also a licensed insurance agent. Joel may recommend insurance products to advisory clients. He is paid a commission for selling such products. He spends approximately 5% of his professional time in his capacity as an insurance agent.

Joel is also a member and Investment Advisor Representative dually registered with Key Client Fiduciary Advisors LLC. He spends about 35% of his time in this capacity.

ITEM 5- ADDITIONAL COMPENSATION

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