



# REALTA WEALTH

**Kari March**

**1201 N. Orange Street Suite 729**

**Wilmington, DE 19801**

**888.657.5200**

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

## ITEM 2- EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Kari March was born in 1953 and attended college at Southern Illinois University in Carbondale, IL where she earned a Bachelor of Science degree in Agriculture in 1975.

Kari founded ROKA Wealth Strategists, LLC (a Georgia-registered investment advisor) in 2006 and has acted in the capacity of Principal and Chief Compliance Officer. Kari remains dually registered with ROKA Wealth Strategists, LLC and Realta Investment Advisors, LLC.

## 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

Kari 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, Kari 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 Kari by purchasing securities or other products through REI, Kari will receive additional compensation in the form of commissions, including 12b-1 fees for the sale of such products. Kari spends approximately 30% of her professional time in her sales capacities at REI.

Kari is the Principal and Chief Compliance Officer and Investment Adviser Representative dually registered with ROKA Wealth Strategists, LLC (a Georgia-registered investment advisor.) She spends about 5% of her time in this capacity.

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

## 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.