

## Item 1. Cover Page

Steve M. Burkett

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This Brochure Supplement provides information about Steve M. Burkett that supplements the Palisade Investments Brochure. You should have received a copy of that Brochure. Please contact Steve Burkett at (425) 489-7868 or [sburkett@palisadeinvestments.com](mailto:sburkett@palisadeinvestments.com) if you did not receive Palisade Investments' Brochure or if you have any questions about the contents of this supplement.

Additional information about *Steve M. Burkett* is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2. Educational Background and Business Experience

Steve M. Burkett -- Born 1970

Bachelor's Degree Economics & Spanish – University of Michigan, Ann Arbor, MI

2007 – Present: Investment Advisor Representative – Palisade Investments

2006 – Registered Representative of Raymond James Financial Services

2005 – Registered Representative of Multi-Bank Securities

1993-2005 – Worked with retirement plan administration and recordkeeping as well as investment management for several large national firms.

Steve Burkett holds the Accredited Investment Fiduciary (AIF®) and the Chartered Retirement Plans Specialist (CRPS®) designations. The AIF® designation certifies that the recipient has specialized knowledge of fiduciary standards of care and their application to the investment management process. To receive the AIF designation, individuals must complete a training program, successfully pass a comprehensive, closed-book final examination under the supervision of a proctor and agree to abide by the AIF Code of Ethics. In order to maintain the AIF designation, the individual must annually renew their affirmation of the AIF Code of Ethics and complete six hours of continuing education credits. The certification is administered by the Center for Fiduciary Studies, LLC (a Fiduciary360 (fi360) company).

Individuals who hold the CRPS® designation have completed a course of study encompassing design, installation, maintenance and administration of retirement plans. The program is designed for approximately 120-150 hours of self-study. Additionally, individuals must pass an end-of-course examination that tests their ability to synthesize complex concepts and apply theoretical concepts to real-

life situations within one year of beginning the course. All designees have agreed to adhere to Standards of Professional Conduct and are subject to a disciplinary process.

### **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. No information is applicable to this Item.

### **Item 4. Other Business Activities**

No information is applicable to this Item.

### **Item 5. Additional Compensation**

No information is applicable to this Item.

### **Item 6. Supervision**

Robin DeSota, as the designated Supervisor of Palisade Investments, supervises all advisors of Palisade Investments according to widely accepted methods of supervision including reviews of emails, correspondence, investment analytics, books and records, and invoices. Robin DeSota, can be reached at (775) 299-4600.