

TRUNORTH

WEALTH PARTNERS

This Brochure Supplement provides information about our advisory staff and supplements the TruNorth Wealth Partners, LLC Brochure. If you have any questions or if you did not receive Form ADV 2A, please contact Peter Rekstad at 651.735.5878.

Additional information about TruNorth Wealth Partners, LLC is also available on the SEC's website at www.adviserinfo.sec.gov

Members of our advisory team have attained financial and/or industry designations. This additional educational background and expertise adds value to our team and what we offer our clients. Each designation requires a unique concentration of study and may or may not have required testing or ongoing continuing education. The specific designations attained by members of our team are described below for your reference.

AIF®—Accredited Investment Fiduciary®

Issued By: fl360.

Prerequisites/Experience Required: Earn a minimum of three points per the valuation framework, which evaluates a candidate's education, professional development and relevant industry experience.

Educational Requirements: Enroll in and successfully complete the AIF designation training program and pass the AIF examination.

Examination Type: Proctored, closed-book examination.

Continuing Education/Experience Requirements: Accrue six hours of continuing professional education each renewal year.

CFP®—Certified Financial Planner™

Issued By: Certified Financial Planner Board of Standards, Inc.

Prerequisites/Experience Required: Candidate must (1) hold a bachelor's degree (or higher) from an accredited college or university, and (2) have completed three years of full-time personal financial planning experience.

Educational Requirements: Candidate must complete a CFP Board-registered program or hold one of the following designations:

- Certified Public Accountant (CPA)
- Chartered Financial Consultant® (ChFC®)
- Chartered Life Underwriter® (CLU®)
- Chartered Financial Analyst® (CFA®)
- Ph.D. in business or economics
- Doctor of Business Administration
- Attorney's license

Examination Type: CFP® Certification Examination.

Continuing Education/Experience Requirements: 30 hours every two years.

CASL—Chartered Advisor for Senior Living

Issued By: The American College.

Prerequisites/Experience Required: Meeting experience requirements for The College's CLU, ShFC, RHU, REBC and CLF designations, or advising clients on financial and/or practical matters relating to their retirement years or on issues dealing with aging for at least three of the five years preceding the awarding of the designation.

Educational Requirements: Five required courses, equivalent to 15 semester credit hours.

Examination Type: Final-closed book proctored exam for each course.

Continuing Education/Experience Requirements: 15 hours every two years.

ChFC—Chartered Financial Consultant

Issued By: The American College.

Prerequisites/Experience Required: Three years of full-time business experience with the five years preceding the awarding of the designation.

Educational Requirements: Seven core and two elective courses, equivalent of 27 semester credit hours.

Examination Type: Final-closed book, proctored exam for each course.

Continuing Education/Experience Requirements: 30 hours every two years.

CLU—Chartered Life Underwriter

Issued By: The American College.

Prerequisites/Experience Required: Three years of full-time business experience with the five years preceding the awarding of the designation.

Educational Requirements: Five core and three elective courses, equivalent of 24 semester credit hours.

Examination Type: Final-closed book, proctored exam for each course.

Continuing Education/Experience Requirements: 30 hours every two years.

Certified Financial Planner Board of Standards Inc. owns the certification marks CFP®, Certified Financial Planner™, CFP® (with plaque design) and CFP® (with flame design) in the U.S., which it awards to individuals who successfully complete CFP Board's initial and ongoing certification requirements.



Peter Rekstad

30 East 7th Street, Suite 3050, St. Paul, MN 55101

Educational Background and Business Experience

Peter Rekstad, born in 1963, completed the following formal education:

- Bachelor's degree from Bethel University, St. Paul, MN in 1985

Mr. Rekstad attained the designation of Chartered Life Underwriter® in 1996, Chartered Financial Consultant® in 2002, and CFP® (Certified Financial Planner™) professional in 2012.

Mr. Rekstad's experience includes the following current and prior employment:

Wealth Partner, CEO—TruNorth Wealth Partners, October 2016 to present

Wealth Partner, CEO—BGM TruNorth Wealth Partners, November 2013 to September 2016

Managing Principal—TruNorth, December 2005 to November 2013

Financial Advisor—Network Planning Advisors, January 2002 to December 2005

Registered Representative, Investment Specialist—Robert W. Baird/NMIS, January 1990 to December 2005

Insurance Agent—Northwestern Mutual Life, August 1989 to December 2005

Disciplinary Information

Registered investment advisors 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.

Other Business Activities & Additional Compensation

No other information is applicable.

Supervision

Mr. Rekstad is subject to TruNorth Wealth Partners' written compliance and supervisory procedures and the related ongoing compliance monitoring and testing. Such procedures address, among other things, the provision of investment advice. Questions concerning Mr. Rekstad's advisory activities may be directed to Travis Gleason, at 651.735.5878.



Travis Gleason

30 East 7th Street, Suite 3050, St. Paul, MN 55101

Educational Background and Business Experience

Travis Gleason, born in 1986, completed the following formal education:

- Bachelor's degree from Bellevue University, Bellevue, NE

Mr. Gleason attained the designation of CFP® (Certified Financial Planner™) professional in 2013.

Mr. Gleason's experience includes the following current and prior employment:

Wealth Partner—TruNorth Wealth Partners, October 2016 to present

Associate Wealth Partner—BGM TruNorth Wealth Partners, November 2013 to September 2016

Financial Advisor—TruNorth, November 2011 to November 2013

Private Client Services Elite, Senior Account Manager—TD Ameritrade, March 2006 to November 2011

Disciplinary Information

Registered investment advisors 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.

Other Business Activities & Additional Compensation

No other information is applicable.

Supervision

Mr. Gleason is subject to TruNorth Wealth Partners' written compliance and supervisory procedures and the related ongoing compliance monitoring and testing. Such procedures address, among other things, the provision of investment advice. Questions concerning Mr. Gleason's advisory activities may be directed to Peter Rekstad at 651.735.5878.



Sharon Morrison

13405 Folsom Blvd, Suite 750, Folsom, CA 95630

Educational Background and Business Experience

Sharon Morrison, born in 1956, completed the following formal education:

- A.A. degree from Seattle Pacific University, Seattle, WA
- Certificate from University of the South, Sewanee, TN

Ms. Morrison attained the designation of CFP® (Certified Financial Planner™) professional in 1990, and the designation of AIF® (Accredited Investment Fiduciary) in 2007.

Ms. Morrison's experience includes the following current and prior employment:

Wealth Partner—TruNorth Wealth Partners, October 2016 to present

Wealth Partner—BGM TruNorth Wealth Partners, November 2013 to September 2016

Principal and Wealth Partner—TruNorth, December 2012 to November 2013

Principal and Investment Advisor—Savant Investment Group, LLC, January 2011 to November 2012

Principal and Investment Advisor—The Savant Group, September 1996 to December 2010

Operations Manager—U.S. Bank Trust Department, June 1992 to August 1996

Investment Advisor—U.S. Bank Trust Department, May 1988 to June 1992

Operations Manager—Footprint Financial Planning, January 1983 to May 1988

Disciplinary Information

Registered investment advisors 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.

Other Business Activities & Additional Compensation

No other information is applicable.

Supervision

Ms. Morrison is subject to TruNorth Wealth Partners' written compliance and supervisory procedures and the related ongoing compliance monitoring and testing. Such procedures address, among other things, the provision of investment advice. Questions concerning Ms. Morrison's advisory activities may be directed to Peter Rekstad at 651.735.5878.



David Sayers

30 East 7th Street, Suite 3050, St. Paul, MN 55101

Educational Background and Business Experience

David Sayers, born in 1976, completed the following formal education:

- Bachelor of Science in Engineering and Business Management from the University of Minnesota
- MBA from the University of Minnesota, Carlson School of Management

Mr. Sayers attained the designation of CFP® (Certified Financial Planner™) professional in 2011, Chartered Life Underwriter® in 2010, Chartered Financial Consultant® in 2011 and Chartered Advisor for Senior Living® in 2011.

Mr. Sayers' experience includes the following current and prior employment:

Wealth Partner—TruNorth Wealth Partners, October 2016 to present

Associate Wealth Partner—BGM TruNorth Wealth Partners, October 2014 to September 2016

Wealth Advisor—Clifton Larson Allen, January 2013 to October 2014

Financial Advisor—Northwestern Mutual, June 2007 to January 2013

Disciplinary Information

Registered investment advisors 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.

Other Business Activities & Additional Compensation

No other information is applicable.

Supervision

Mr. Sayers is subject to TruNorth Wealth Partners' written compliance and supervisory procedures and the related ongoing compliance monitoring and testing. Such procedures address, among other things, the provision of investment advice. Questions concerning Mr. Sayers' advisory activities may be directed to Peter Reksad at 651.735.5878.

TRUNORTH

WEALTH PARTNERS

Wherever Life and Wealth Intersect

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