

Supplement Date: 03/31/2020

Cascadia Advisory Services, LLC

Registered Investment Advisor (RIA)
8050 SW Pfaffle Street, Suite 100
Portland, OR 97223
503-620-5236
info@cascadiawm.com
Firm CRD Number: 290231

Eric Krausz Adler
dba Cascadia Wealth Management

Investment Advisor Representative (IAR)
207 NE 19th Street, Suite 302
McMinnville, OR 97128
503-434-2757
eric@cascadiawm.com
Personal CRD Number: 2113992

This brochure supplement provides information about Eric Krausz Adler that supplements the Cascadia Advisory Services, LLC brochure. You should have received a copy of that brochure. Please contact Mr. Adler if you did not receive Cascadia Advisory Services, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Eric Krausz Adler is also available on the SEC's website at www.adviserinfo.sec.gov.

Educational Background and Business Experience***Education***

Bachelor of Arts Business / Finance, Michigan State University – 1990

Securities Registrations

SERIES 65 - The Uniform Investment Adviser Law (Series 65) qualifies holders as Investment Advisor Representatives.

Professional Designations

None

Business History for the Past Five Years

Firm	Position Held	Start Date	End Date
Cascadia Wealth Management	Financial Advisor	05/2003	present
Cascadia Advisory Services, LLC	Investment Advisor Representative	02/2018	present
Cetera Advisors LLC	Registered Representative	01/2013	11/2019
Cetera Advisors LLC	Investment Advisor Representative	01/2013	10/2018
Multi-Financial Securities, Corp	Registered Representative Investment Advisor Representative	02/2012	01/2013

Eric was born in 1967

Disciplinary Information

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

Other Business Activities

Eric holds a license with the State of Oregon as a life and health agent through which he can offer life insurance, disability policies, annuities, and long-term care coverage. Clients should be aware that these services pay a commission and involve a possible conflict of interest, as commissionable products can conflict with the fiduciary duties of a registered investment advisor. Cascadia Advisory Services, LLC always acts in the best interest of the client; including in the sale of commissionable products to advisory clients. Clients are in no way required to utilize the services any representative of Cascadia Advisory Services, LLC in such individual's outside capacity.

Eric uses Cascadia Wealth Management as a DBA for all of his securities and insurance related activities.

Eric uses Squirrel Group LLC for accounting and tax-reporting purposes. It is not client-facing or a source of revenue.

Eric teaches educational financial workshops in various venues.

Additional Compensation

Eric does not receive any economic benefit from any person, company, or organization, other than Cascadia Advisory Services, LLC in exchange for providing clients advisory services through Cascadia Advisory Services, LLC.

Supervision

As a representative of Cascadia Advisory Services, LLC, Eric Krausz Adler is supervised by Michael Jeanfreau, the firm's Chief Compliance Officer. Mr. Jeanfreau is responsible for ensuring that Eric adheres to all required regulations regarding the activities of an Investment Advisor Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Michael Jeanfreau is (503) 620-5236.

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Cascadia Advisory Services, LLC

Registered Investment Advisor (RIA)
 8050 SW Pfaffle Street, Suite 100
 Portland, OR 97223
 503-620-5236
 info@cascadiawm.com
 Firm CRD Number: 290231

Jeremiah Beam
dba Cascadia Wealth Management

Investment Advisor Representative (IAR)
 8050 SW Pfaffle Street, Suite 100
 Portland, OR 97223
 503-620-5236
 jeremiah@cascadiawm.com
 Personal CRD Number: 6629375

This brochure supplement provides information about Jeremiah Beam that supplements the Cascadia Advisory Services, LLC brochure. You should have received a copy of that brochure. Please contact Mr. Beam if you did not receive Cascadia Advisory Services, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Jeremiah Anthony Beam is also available on the SEC's website at www.adviserinfo.sec.gov.

Educational Background and Business Experience
Education

Bachelor of Science Fine Art, Portland State University - 2013

Securities Registrations

SERIES 7 - The General Securities Representative (Series 7) qualifies a holder for the solicitation, purchase, and/or sale of all securities products, including corporate securities, municipal securities, municipal fund securities, options, direct participation programs, investment company products, and variable contracts.

SERIES 66 - The Uniform Investment Combined State Law (Series 66) qualifies holders as both securities agents and investment adviser representatives.

Professional Designations

None

Business History for the Past Five Years

Firm	Position Held	Start Date	End Date
Cascadia Wealth Management	Financial Advisor	01/2018	present
Cascadia Advisory Services, LLC	Investment Advisor Representative	04/2018	present
Cetera Advisors LLC	Registered Representative Investment Adviser Representative	01/2018	present
Beam 5 Creative Studio	Sole Proprietor	01/2016	present
Restaurants Unlimited, Inc.	Bartender	10/2016	4/2018
Waddell & Reed, Inc.	Financial Advisor	07/2016	12/2017
Bank of America, N.A.	Financial Center Manager 2	09/2014	06/2016
Panera Bread LLC	General Manager	10/2013	08/2014

Jeremiah was born in 1978

Disciplinary Information

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

Other Business Activities

Jeremiah is a registered representative with Cetera Advisors LLC. From time to time, he can offer clients advice or products from this activity. Jeremy also holds a license with the State of Oregon as a life and health agent through which he can offer life insurance, disability policies, annuities, and long-term care coverage. Clients should be aware that these services pay a commission and involve a possible conflict of interest, as commissionable products can conflict with the fiduciary duties of a registered investment advisor. Jeremiah is also an investment adviser representative with Cetera Advisors LLC. From time to time, he can offer clients advice or products from this activity. Cascadia Advisory Services, LLC always acts in the best interest of the client; including in the sale of commissionable products to advisory clients. Clients are in no way required to utilize the services any representative of Cascadia Advisory Services, LLC in such individual's outside capacity.

Jeremiah uses Cascadia Wealth Management as a DBA for all of his securities and insurance related activities.

Jeremiah teaches educational financial workshops in various venues.

Jeremiah Beam is the Sole Proprietor of Beam 5 Creative Studio, a creative enterprise for the production and sale of creative goods and services.

Additional Compensation

Jeremiah does not receive any economic benefit from any person, company, or organization, other than Cascadia Advisory Services, LLC in exchange for providing clients advisory services through Cascadia Advisory Services, LLC.

Supervision

As a representative of Cascadia Advisory Services, LLC, Jeremiah is supervised by Michael Jeanfreau, the firm's Chief Compliance Officer. Michael is responsible for ensuring that Jeremiah adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. Michael's phone number is (503) 620-5236.

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Registered Investment Advisor (RIA)
 8050 SW Pfaffle Street, Suite 100
 Portland, OR 97223
 503-620-5236
 info@cascadiawm.com
 Firm CRD Number: 290231

**Robert Patrick Biancardi, CWS®
 dba Casadia Wealth Management**

Investment Advisor Representative (IAR)
 8050 SW Pfaffle Street, Suite 100
 Portland, OR 97223
 503-620-5236
 robert@cascadiawm.com
 Personal CRD Number: 5716574

This brochure supplement provides information about Robert Patrick Biancardi that supplements the Cascadia Advisory Services, LLC brochure. You should have received a copy of that brochure. Please contact Mr. Biancardi if you did not receive Cascadia Advisory Services, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Robert Patrick Biancardi is also available on the SEC's website at www.adviserinfo.sec.gov.

Educational Background and Business Experience
Education

High School Diploma

Studied Engineering at California State Polytechnic University – Pomona for about 2 years

Securities Registrations

SERIES 6 - The Investment Company Products/Variable Contracts Limited Representative (Series 6) qualifies a holder for the solicitation, purchase, and/or sale of redeemable securities of companies registered pursuant to the Investment Company Act of 1940; securities of closed-end companies registered pursuant to the investment company act of 1940 during the period of original distribution only; and variable contracts and insurance premium funding programs and other contracts issued by an insurance company.

SERIES 7 - The General Securities Representative (Series 7) qualifies a holder for the solicitation, purchase, and/or sale of all securities products, including corporate securities, municipal securities, municipal fund securities, options, direct participation programs, investment company products, and variable contracts.

SERIES 63 - The Uniform Securities Agent State Law (Series 63) qualifies holders as securities agents. the examination covers the principles of state securities regulation reflected in the Uniform Securities Act.

SERIES 65 - The Uniform Investment Adviser Law (Series 65) qualifies holders as Investment Adviser Representatives.

Professional Designations

Certified Wealth Strategist® (CWS®). The CWS utilizes a blended learning approach that includes instructor-led training, 13 Wealth Management Issues study guides, online mastery exams, conversation skill builders and eLessons. The learning experience culminates with a Capstone Project: a written document demonstrating a sustainable framework which applies the new knowledge and skills to the practitioner's business.

Business History for the Past Five Years

Firm	Position Held	Start Date	End Date
Cascadia Wealth Management	Financial Advisor Managing Principal	01/2013	present
Cascadia Advisory Services, LLC	Investment Advisor Representative Managing Principal	12/2017	present
Cetera Advisors LLC	Registered Representative	01/2013	present
Cetera Advisors LLC	Investment Adviser Representative	01/2013	12/2018
Fairway Independent Mortgage Company	Loan Originator	04/2014	10/2018

Firm	Position Held	Start Date	End Date
Top Flite Financial	Loan Originator	03/2011	03/2014

Robert was born in 1963

Disciplinary Information

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

Other Business Activities

Robert is a registered representative with Cetera Advisors LLC. From time to time, he will offer clients advice or products from this activity. Robert also holds a license with the State of Oregon as a life and health agent through which he can offer life insurance, disability policies, annuities, and long-term care coverage. Clients should be aware that these services pay a commission and involve a possible conflict of interest, as commissionable products can conflict with the fiduciary duties of a registered investment advisor. Cascadia Advisory Services, LLC always acts in the best interest of the client; including in the sale of commissionable products to advisory clients. Clients are in no way required to utilize the services any representative of Cascadia Advisory Services, LLC in such individual's outside capacity.

Robert uses Cascadia Wealth Management as a DBA for all of his securities and insurance related activities.

Barn Works, Inc. as an S-Corp owned by Robert which he uses for accounting and tax-reporting purposes and is not client-facing.

Additional Compensation

Robert Patrick Biancardi does not receive any economic benefit from any person, company, or organization, other than Cascadia Advisory Services, LLC in exchange for providing clients advisory services through Cascadia Advisory Services, LLC.

Supervision

As a representative of Cascadia Advisory Services, LLC, Robert Patrick Biancardi is supervised by Michael Jeanfreau, the firm's Chief Compliance Officer. Mr. Jeanfreau is responsible for ensuring that Robert Patrick Biancardi adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Michael Jeanfreau is (503) 620-5236.

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8050 SW Pfaffle Street, Suite 100
Portland, OR 97223
503-620-5236
info@cascadiawm.com
Firm CRD Number: 290231

**Gregory Scott Bowen, CFP® ChFC®
dba Cascadia Wealth Management**

Investment Advisor Representative (IAR)
8050 SW Pfaffle Street, Suite 100
Portland, OR 97223
503-620-5236
greg@cascadiawm.com
Personal CRD Number: 232890

This brochure supplement provides information about Gregory Scott Bowen that supplements the Cascadia Advisory Services, LLC brochure. You should have received a copy of that brochure. Please contact Mr. Bowen if you did not receive Cascadia Advisory Services, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Gregory Scott Bowen is also available on the SEC's website at www.adviserinfo.sec.gov.

Educational Background and Business Experience***Education***

High School Diploma

Securities Registrations

SERIES 7 - The General Securities Representative (Series 7) qualifies a holder for the solicitation, purchase, and/or sale of all securities products, including corporate securities, municipal securities, municipal fund securities, options, direct participation programs, investment company products, and variable contracts.

SERIES 24 - The General Securities Principal (Series 24) qualifies the holder to supervise the activities of General Securities Representatives.

SERIES 63 - The Uniform Securities Agent State Law (Series 63) qualifies holders as securities agents. The examination covers the principles of state securities regulation reflected in the Uniform Securities Act.

SERIES 65 - The Uniform Investment Adviser Law (Series 65) qualifies holders as Investment Adviser Representatives.

Professional Designations**CFP® - Certified Financial Planner**

The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP (with flame design) marks (collectively, the "CFP® marks") are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board").

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- Education – Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board's studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a Bachelor's Degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP Board's financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;

- Examination – Pass the comprehensive CFP® Certification Examination. The examination includes case studies and client scenarios designed to test one's ability to correctly diagnose financial planning issues and apply one's knowledge of financial planning to real world circumstances;
- Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
- Ethics – Agree to be bound by CFP Board's Standards of Professional Conduct, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- Continuing Education – Complete 30 hours of continuing education hours every two years, including two hours on the Code of Ethics and other parts of the Standards of Professional Conduct, to maintain competence and keep up with developments in the financial planning field; and
- Ethics – Renew an agreement to be bound by the Standards of Professional Conduct. The Standards prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board's enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

ChFC®- Chartered Financial Consultant®

ChFC® MINIMUM QUALIFICATIONS:

- Bachelor's degree or its equivalent, in any discipline, from an accredited university, this qualifies as one year of business experience
- Three years of full-time business experience is required; this three-year period must be within the five years preceding the date of the award (part-time qualifying business experience is also credited toward the three-year requirement with 2,000 hours representing the equivalent of one year full-time experience).
- Must fulfill the ChFC® seven course curriculum, as well as two additional elective courses
- Pass the exams for all required and elective courses
- Pass a background check and candidate fitness standards test. You must reveal any criminal history, pending litigation or ethical violations. The CFP board verifies all employment history, qualifications and disciplinary issues via FINRA's Central Registration Depository.

Business History for the Past Five Years

Firm	Position Held	Start Date	End Date
Cascadia Wealth Management	Financial Advisor Managing Principal	03/2003	present
Cascadia Advisory Services, LLC	Investment Advisor Representative Managing Principal	12/2017	present
Cetera Advisors LLC	Registered Representative	01/2013	present
Cetera Advisors LLC	Investment Advisor Representative	01/2013	10/2018
Portland Community College	Instructor	03/2017	present

Greg was born in 1963

Disciplinary Information

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

Other Business Activities

Greg is a registered representative with Cetera Advisors LLC. From time to time, he will offer clients advice or products from this activity. Greg also holds a license with the State of Oregon as a life and health agent through which he can offer life insurance, disability policies, annuities, and long-term care coverage. Clients should be aware that these services pay a commission and involve a possible conflict of interest, as commissionable products can conflict with the fiduciary duties of a registered investment advisor. Cascadia Advisory Services, LLC always acts in the best interest of the client; including in the sale of commissionable products to advisory clients. Clients are in no way required to utilize the services any representative of Cascadia Advisory Services, LLC in such individual's outside capacity.

Greg uses Cascadia Wealth Management as a DBA for all of his securities and insurance related activities.

Greg uses Bowen Consulting Group PC for accounting and tax-reporting purposes. It is not client-facing or a source of revenue.

Greg teaches educational financial workshops in various venues.

Additional Compensation

Gregory Scott Bowen does not receive any economic benefit from any person, company, or organization, other than Cascadia Advisory Services, LLC in exchange for providing clients advisory services through Cascadia Advisory Services, LLC..

Supervision

As a representative of Cascadia Advisory Services, LLC, Gregory Scott Bowen is supervised by Michael Jeanfreau, the firm's Chief Compliance Officer. Mr. Jeanfreau is responsible for ensuring that Greg adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Michael Jeanfreau is (503) 620-5236.

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Cascadia Advisory Services, LLC

Registered Investment Advisor (RIA)
8050 SW Pfaffle Street, Suite 100
Portland, OR 97223
503-620-5236
info@cascadiawm.com
Firm CRD Number: 290231

**James Richard Crocker, CDFA® AIF®
dba Full Cycle Financial Partners and
Cascadia Wealth Management**

Investment Advisor Representative (IAR)
380 Diablo Road, Suite 201
Danville, CA 94526
925-885-6020
jim@fullcyclefp.com
Personal CRD Number: 5127548

This brochure supplement provides information about James Richard Crocker that supplements the Cascadia Advisory Services, LLC brochure. You should have received a copy of that brochure. Please contact Mr. Crocker if you did not receive Cascadia Advisory Services, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about James Richard Crocker is also available on the SEC's website at www.adviserinfo.sec.gov.

Educational Background and Business Experience***Education***

MS Geological Sciences, San Diego State University – 1987

BS Geological Sciences, San Diego State University – 1981

Securities Registrations

SERIES 7 - The General Securities Representative (Series 7) qualifies a holder for the solicitation, purchase, and/or sale of all securities products, including corporate securities, municipal securities, municipal fund securities, options, direct participation programs, investment company products, and variable contracts.

SERIES 63 - The Uniform Securities Agent State Law (Series 63) qualifies holders as securities agents. The examination covers the principles of state securities regulation reflected in the Uniform Securities Act.

SERIES 65 - The Uniform Investment Adviser Law (Series 65) qualifies holders as Investment Adviser Representatives.

Professional Designations**CDFA® - Certified Divorce Financial Analyst®**

The CDFA designation is available to individuals who have a minimum of three years' experience as a financial professional, accountant, or matrimonial lawyer. To earn the designation, the participant must complete a series of self-study course modules and pass an exam for each module. All exams are taken at an approved testing center.

- Financial and Legal Issues of Divorce
- Advanced Financial Issues of Divorce
- Tax Issues of Divorce
- Working as a CDFA: Case Studies

AIF® - Accredited Investment Fiduciary®

AIF® candidates must meet a point-based threshold based on a combination of education, relevant industry experience and/or professional development. They complete either a web-based or capstone program and must pass a proctored, closed book exam. Designees must complete 6 hours of continuing education each year.

Business History for the Past Five Years

Firm	Position Held	Start Date	End Date
Full Cycle Financial Partners	Financial Advisor	1/2017	present
Cascadia Wealth Management	Financial Advisor	3/2011	present
Cascadia Advisory Services, LLC	Investment Advisor Representative	6/2018	present
Cetera Advisors LLC	Registered Representative Investment Advisor Representative	3/2012	present

James was born in 1958

Disciplinary Information

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

Other Business Activities

James is a registered representative with Cetera Advisors LLC. From time to time, he will offer clients advice or products from this activity. James also holds a license with the State of California and the State of Washington as a life and health agent through which he can offer life insurance, disability policies, annuities, and long-term care coverage. Clients should be aware that these services pay a commission and involve a possible conflict of interest, as commissionable products can conflict with the fiduciary duties of a registered investment adviser. James is also an investment adviser representative with Cetera Advisors LLC. From time to time, he will offer clients advice or products from this activity. Cascadia Advisory Services, LLC always acts in the best interest of the client; including in the sale of commissionable products to advisory clients. Clients are in no way required to utilize the services any representative of Cascadia Advisory Services, LLC in such individual's outside capacity.

James uses Full Cycle Financial Partners as a DBA for all of his securities and insurance related activities.

James is affiliated with Cascadia Wealth Management with which he shares technology, educational, and practice management resources.

Additional Compensation

James Richard Crocker does not receive any economic benefit from any person, company, or organization, other than Cascadia Advisory Services, LLC in exchange for providing clients advisory services through Cascadia Advisory Services, LLC..

Supervision

As a representative of Cascadia Advisory Services, LLC, James Richard Crocker is supervised by Michael Paul Jeanfreau, the firm's Chief Compliance Officer. Mr. Jeanfreau is responsible for ensuring that James adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Mr. Jeanfreau is (503) 620-5236.

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Cascadia Advisory Services, LLC

Registered Investment Advisor (RIA)
 8050 SW Pfaffle Street, Suite 100
 Portland, OR 97223
 503-620-5236
 info@cascadiawm.com
 Firm CRD Number: 290231

Steven Raymond Dutton
dba Cascadia Wealth Management

Investment Advisor Representative (IAR)
 612 Pacific Avenue
 Tillamook, OR 97141
 503-812-3389
 stevedutton@ceteraadvisors.com
 Personal CRD Number: 4686263

This brochure supplement provides information about Steven Dutton that supplements the Cascadia Advisory Services, LLC brochure. You should have received a copy of that brochure. Please contact Mr. Dutton if you did not receive Cascadia Advisory Services, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Steven Raymond Dutton is also available on the SEC's website at www.adviserinfo.sec.gov.

Educational Background and Business Experience
Education

Master of Arts in Teaching Education, Willamette University - 1999

Bachelor of Science in Rhetoric & Communications, Willamette University – 1993

Securities Registrations

SERIES 7 - The General Securities Representative (Series 7) qualifies a holder for the solicitation, purchase, and/or sale of all securities products, including corporate securities, municipal securities, municipal fund securities, options, direct participation programs, investment company products, and variable contracts.

SERIES 66 - The Uniform Investment Combined State Law (Series 66) qualifies holders as both securities agents and investment adviser representatives.

Business History for the Past Five Years

Firm	Position Held	Start Date	End Date
Cascadia Wealth Management	Financial Advisor	1/2006	present
Cascadia Advisory Services, LLC	Investment Advisor Representative	4/2018	present
Cetera Advisors LLC	Registered Representative Investment Adviser Representative	1/2013	present
Tillamook Bay Community College	Adjunct Professor	1/2013	present

Steven was born in 1971

Disciplinary Information

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

Other Business Activities

Steve is a registered representative with Cetera Advisors LLC. From time to time, he can offer clients advice or products from this activity. Steve also holds a license with the State of Oregon as a life and health agent through which he can offer life insurance, disability policies, annuities, and long-term care coverage. Clients should be aware that these services pay a commission and involve a possible conflict of interest, as commissionable products can conflict with the fiduciary duties of a registered investment advisor. Steve is also an investment adviser representative with Cetera Advisors LLC. From time to time, he can offer clients advice or products from this activity. Cascadia Advisory Services, LLC always acts in the best interest

of the client; including in the sale of commissionable products to advisory clients. Clients are in no way required to utilize the services any representative of Cascadia Advisory Services, LLC in such individual's outside capacity.

Steve Dutton is an Adjunct Professor at Tillamook Bay Community College. He doesn't receive securities-related compensation for this activity.

Additional Compensation

Steven does not receive any economic benefit from any person, company, or organization, other than Cascadia Advisory Services, LLC in exchange for providing clients advisory services through Cascadia Advisory Services, LLC.

Supervision

As a representative of Cascadia Advisory Services, LLC, Steven is supervised by Michael Jeanfreau, the firm's Chief Compliance Officer. Michael is responsible for ensuring that Steven adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. Michael's phone number is (503) 620-5236.

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 info@cascadiawm.com
 Firm CRD Number: 290231

**Eric Scott Evans
 dba Cascadia Wealth Management**

Investment Advisor Representative (IAR)
 16135 SW Railroad St
 Sherwood, OR 97140
 503-822-3986
 eevans@cascadiawm.com
 Personal CRD Number: 5210934

This brochure supplement provides information about Eric Scott Evans that supplements the Cascadia Advisory Services, LLC brochure. You should have received a copy of that brochure. Please contact Mr. Evans if you did not receive Cascadia Advisory Services, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Eric Scott Evans is also available on the SEC's website at www.adviserinfo.sec.gov.

Educational Background and Business Experience
Education

Bachelor of Science in Finance, University of Utah – 2003

Juris Doctorate Law, Northwestern School of Law – 2006

Securities Registrations

SERIES 7 - The General Securities Representative (Series 7) qualifies a holder for the solicitation, purchase, and/or sale of all securities products, including corporate securities, municipal securities, municipal fund securities, options, direct participation programs, investment company products, and variable contracts.

SERIES 66 - The Uniform Investment Combined State Law (Series 66) qualifies holders as both securities agents and investment adviser representatives.

Professional Designations

None

Business History for the Past Five Years

Firm	Position Held	Start Date	End Date
Cascadia Advisory Services, LLC	Investment Advisor Representative	09/2019	present
Evans Insurance Agency, LLC	Insurance Agent	12/2016	present
Altech Financial Servcies	Insurance Agent	12/2015	12/2016
Cetera Advisors LLC	Registered Representative	02/2012	present
Cetera Advisors LLC	Investment Advisor Representative	02/2012	present
Cascadia Wealth Management	Financial Advisor	04/2010	present

Eric was born in 1978

Disciplinary Information

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

Other Business Activities

Eric is a registered representative with Cetera Advisors LLC, member FINRA/SIPC, a broker/dealer. From time to time, he can offer clients products from this activity. Eric also holds a license as a life and health agent through which he can offer life insurance, disability policies, annuities, and long-term care coverage. Eric is also licensed to offer property and casualty

insurance. Clients should be aware that these services pay a commission and involve a possible conflict of interest, as commissionable products can conflict with the fiduciary duties of a registered investment advisor. Eric is registered as an investment adviser representative with both Cetera Advisors LLC and Cascadia Advisors Services, LLC, Registered Investment Advisors (RIA). He can therefore offer clients advisory services through either RIA. Cascadia Advisory Services, LLC always acts in the best interest of the client; including in the sale of commissionable products to advisory clients. Clients are in no way required to utilize the services any representative of Cascadia Advisory Services, LLC in such individual's outside capacity.

Eric uses Cascadia Wealth Management as a DBA for all of his securities related activities.

Eric owns Evans Insurance Agency through which he offers life insurance, disability policies, annuities, long-term care coverage, and property and casualty coverage.

Evans Wealth Management is an S-Corp owned by Eric which he uses for accounting and tax-reporting purposes. It is not client-facing or a source of revenue.

Additional Compensation

Eric Scott Evans does not receive any economic benefit from any person, company, or organization, other than Cascadia Advisory Services, LLC in exchange for providing clients advisory services through Cascadia Advisory Services, LLC.

Supervision

As a representative of Cascadia Advisory Services, LLC, Eric Scott Evans is supervised by Michael Jeanfreau, the firm's Chief Compliance Officer. Mr. Jeanfreau is responsible for ensuring that Eric adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Michael Jeanfreau is (503) 620-5236.

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503-620-5236
info@cascadiawm.com
Firm CRD Number: 290231

**Sandra Lee Hay Magdaleno, CFP®
dba Cascadia Wealth Management**

Investment Advisor Representative (IAR)
5110 SE Powell Blvd
Portland, OR 97206
503-943-6388
sandra@cascadiawm.com
Personal CRD Number: 1635367

This brochure supplement provides information about Sandra Lee Hay Magdaleno that supplements the Cascadia Advisory Services, LLC brochure. You should have received a copy of that brochure. Please contact Ms. Hay Magdaleno if you did not receive Cascadia Advisory Services, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Sandra Lee Hay Magdaleno is also available on the SEC's website at www.adviserinfo.sec.gov.

Educational Background and Business Experience***Education***

Bachelor of Arts Sociology, Luther College - 1974

Securities Registrations

SERIES 7 - The General Securities Representative (Series 7) qualifies a holder for the solicitation, purchase, and/or sale of all securities products, including corporate securities, municipal securities, municipal fund securities, options, direct participation programs, investment company products, and variable contracts.

SERIES 63 - The Uniform Securities Agent State Law (Series 63) qualifies holders as securities agents. the examination covers the principles of state securities regulation reflected in the Uniform Securities Act.

SERIES 65 - The Uniform Investment Adviser Law (Series 65) qualifies holders as Investment Adviser Representatives.

Professional Designations**CFP® - Certified Financial Planner**

The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP (with flame design) marks (collectively, the "CFP® marks") are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board").

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- Education – Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board's studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a Bachelor's Degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP Board's financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;
- Examination – Pass the comprehensive CFP® Certification Examination. The examination includes case studies and client scenarios designed to test one's ability to correctly diagnose financial planning issues and apply one's knowledge of financial planning to real world circumstances;
- Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and

- Ethics – Agree to be bound by CFP Board’s Standards of Professional Conduct, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- Continuing Education – Complete 30 hours of continuing education hours every two years, including two hours on the Code of Ethics and other parts of the Standards of Professional Conduct, to maintain competence and keep up with developments in the financial planning field; and
- Ethics – Renew an agreement to be bound by the Standards of Professional Conduct. The Standards prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board’s enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

Business History for the Past Five Years

Firm	Position Held	Start Date	End Date
Cascadia Wealth Management	Financial Advisor	01/2006	present
Cascadia Advisory Services, LLC	Investment Adviser Representative	08/2019	present
Legacy Wealth Management	Financial Advisor	04/2019	present
Cetera Advisors LLC	Registered Representative	01/2012	present
Cetera Advisors LLC	Investment Adviser Representative	01/2012	present

Sandra was born in 1952

Disciplinary Information

There are no legal or disciplinary events that are material to a client’s or prospective client’s evaluation of this advisory business.

Other Business Activities

Sandra is a registered representative with Cetera Advisors LLC. From time to time, she can offer clients advice or products from this activity. Sandra also holds a license as a life and health agent through which she can offer life insurance, disability policies, annuities, and long-term care coverage. Clients should be aware that these services pay a commission and involve a possible conflict of interest, as commissionable products can conflict with the fiduciary duties of a registered investment advisor. Sandra is also an investment adviser representative with Cetera Advisors LLC. From time to time, she can offer clients advice or products from this activity. Cascadia Advisory Services, LLC always acts in the best interest of the client; including in the sale of commissionable products to advisory clients.

Sandra uses Cascadia Wealth Management and Legacy Wealth Management as DBAs for all of her securities and insurance related activities.

Legacy Wealth Management LLC as an entity owned by Sandra which she uses for accounting and tax-reporting purposes. It is not client-facing or a source of revenue.

Sandra is affiliated with Healthy Legacies, a provider of health and wellness products, for whom she does product brokerage and Internet marketing.

Sandra is also a tax preparer with H&R Block.

Sandra occasionally leases a portion of her home through AirBNB and other vacation rental sites.

Sandra occasionally invests in rental real estate properties.

Clients are in no way required to utilize the services any representative of Cascadia Advisory Services, LLC in such individual's outside capacity.

Additional Compensation

Sandra Lee Hay Magdaleno does not receive any economic benefit from any person, company, or organization, other than Cascadia Advisory Services, LLC in exchange for providing clients advisory services through Cascadia Advisory Services, LLC.

Supervision

As a representative of Cascadia Advisory Services, LLC, Sandra Lee Hay Magdaleno is supervised by Michael Jeanfreau, the firm's Chief Compliance Officer. Mr. Jeanfreau is responsible for ensuring that Sandra adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Michael Jeanfreau is (503) 620-5236.

Supplement Date: 03/31/2020

Cascadia Advisory Services, LLC

Registered Investment Advisor (RIA)
8050 SW Pfaffle Street, Suite 100
Portland, OR 97223
503-620-5236
info@cascadiawm.com
Firm CRD Number: 290231

Timothy Robert Knapp, CFP®**dba Asset Management Strategies, Inc.**

Investment Advisor Representative (IAR)
400 108th Avenue NE, Suite 630
Bellevue, WA 98004
425-646-7204
tk@asset-mgmt-strategies.com
Personal CRD Number: 1806377

This brochure supplement provides information about Timothy Robert Knapp that supplements the Cascadia Advisory Services, LLC brochure. You should have received a copy of that brochure. Please contact Mr. Knapp if you did not receive Cascadia Advisory Services, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Timothy Robert Knapp is also available on the SEC's website at www.adviserinfo.sec.gov.

Educational Background and Business Experience***Education***

Certified Financial Planner, College of Financial Planning – 1994

Bachelor of Arts – Pastoral Ministries, Northwest College – 1986

Bachelor of Science – Accounting, Montclair State – 1983

Securities Registrations

SERIES 6 - The Investment Company Products/Variable Contracts Limited Representative (Series 6) qualifies a holder for the solicitation, purchase, and/or sale of redeemable securities of companies registered pursuant to the Investment Company Act of 1940; securities of closed-end companies registered pursuant to the investment company act of 1940 during the period of original distribution only; and variable contracts and insurance premium funding programs and other contracts issued by an insurance company.

SERIES 22 - The Direct Participation Limited Representative Exam (Series 22) is designed and administered by the FINRA. This test was created to test the knowledge of those individuals who seek to work with various Direct Participation Programs such as oil and gas, limited partnerships and real estate.

SERIES 62 - The Corporate Securities Representative (Series 62) is a certification providing registered representatives with the authority to transact corporate equities and corporate debt securities for clients. Series 62 representatives can trade some of the most commonly transacted individual securities including stocks, bonds, closed-end funds and exchange-traded funds.

SERIES 63 - The Uniform Securities Agent State Law (Series 63) qualifies holders as securities agents. the examination covers the principles of state securities regulation reflected in the Uniform Securities Act.

Professional Designations**CFP® - Certified Financial Planner**

The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP (with flame design) marks (collectively, the "CFP® marks") are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board").

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- Education – Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board’s studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a Bachelor’s Degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP Board’s financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;
- Examination – Pass the comprehensive CFP® Certification Examination. The examination includes case studies and client scenarios designed to test one’s ability to correctly diagnose financial planning issues and apply one’s knowledge of financial planning to real world circumstances;
- Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
- Ethics – Agree to be bound by CFP Board’s Standards of Professional Conduct, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- Continuing Education – Complete 30 hours of continuing education hours every two years, including two hours on the Code of Ethics and other parts of the Standards of Professional Conduct, to maintain competence and keep up with developments in the financial planning field; and
- Ethics – Renew an agreement to be bound by the Standards of Professional Conduct. The Standards prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board’s enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

Business History for the Past Five Years

Firm	Position Held	Start Date	End Date
Asset Management Strategies, Inc.	President	12/1998	present
Cascadia Advisory Services, LLC	Investment Adviser Representative	08/2019	present
Cetera Advisors LLC	Registered Representative Investment Adviser Representative	01/2013	present

Timothy was born in 1959

Disciplinary Information

There are no legal or disciplinary events that are material to a client’s or prospective client’s evaluation of this advisory business.

Other Business Activities

Timothy is a registered representative with Cetera Advisors LLC. From time to time, he can offer clients advice or products from this activity. Timothy also holds a license as a life and health agent through which he can offer life insurance, disability policies, annuities, and long-term care coverage. Clients should be aware that these services pay a commission and involve a possible conflict of interest, as commissionable products can conflict with the fiduciary duties of a registered investment advisor. Timothy is also an investment adviser representative with Cetera Advisors LLC. From time to time, he can offer clients advice or products from this activity. Cascadia Advisory Services, LLC always acts in the best interest of the client; including in the sale of commissionable products to advisory clients. Clients are in no way required to utilize the services any representative of Cascadia Advisory Services, LLC in such individual's outside capacity.

Other investment related business activities pertain to securities, commodities, banking, insurance, or real estate. Other investment related business activities that your Advisor performs may result in the receipt of fees, commissions and/or bonuses. It may also result in other forms of compensation, which are based on the sales of securities and/or the value of assets under management. This includes trail, distribution and service fees related to certain mutual funds and insurance products. Trail, distribution and service fees are paid out of the fund or insurance product assets and are therefore indirectly

paid by you, the client. Another form of “indirect compensation” may also be paid to your Advisor by sponsors of investment products, programs or services. This indirect compensation may include entertainment, attendance at events, attendance at educational conferences, reimbursements for approved business expenses, investment research, technology support and other resources that may assist with your Advisor’s investment business.

Timothy uses Asset Management Strategies, Inc. as a DBA for all of his securities and insurance related activities.

Timothy is an advisor to the Board of the Northwest University School of Business. He also serves as a Trustee of the Northwest University Foundation.

Additional Compensation

Timothy Robert Knapp does not receive any economic benefit from any person, company, or organization, other than Cascadia Advisory Services, LLC in exchange for providing clients advisory services through Cascadia Advisory Services, LLC.

Supervision

As a representative of Cascadia Advisory Services, LLC, Timothy Robert Knapp is supervised by Michael Jeanfreau, the firm's Chief Compliance Officer. Mr. Jeanfreau is responsible for ensuring that Timothy adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm’s Code of Ethics and compliance manual. The phone number for Michael Jeanfreau is (503) 620-5236.

Supplement Date: 03/31/2020

Cascadia Advisory Services, LLC

Registered Investment Advisor (RIA)
8050 SW Pfaffle Street, Suite 100
Portland, OR 97223
503-620-5236
info@cascadiawm.com
Firm CRD Number: 290231

**William Henry Leder Jr., CFP®
dba Cascadia Wealth Management**

Investment Advisor Representative (IAR)
8050 SW Pfaffle Street, Suite 100
Portland, OR 97223
503-620-5236
bill@cascadiawm.com
Personal CRD Number: 3025254

This brochure supplement provides information about William Henry Leder Jr. that supplements the Cascadia Advisory Services, LLC brochure. You should have received a copy of that brochure. Please contact Mr. Leder if you did not receive Cascadia Advisory Services, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about William Henry Leder Jr. is also available on the SEC's website at www.adviserinfo.sec.gov.

Educational Background and Business Experience***Education***

Bachelor Finance, Oregon State University - 1997

Associates Business, Ricks College - 1994

Securities Registrations

SERIES 63 - The Uniform Securities Agent State Law (Series 63) qualifies holders as securities agents. The examination covers the principles of state securities regulation reflected in the Uniform Securities Act.

SERIES 66 - The Uniform Investment Combined State Law (Series 66) qualifies holders as both securities agents and investment adviser representatives.

Professional Designations**CFP® - Certified Financial Planner**

The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP (with flame design) marks (collectively, the "CFP® marks") are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board").

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- Education – Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board's studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a Bachelor's Degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP Board's financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;
- Examination – Pass the comprehensive CFP® Certification Examination. The examination includes case studies and client scenarios designed to test one's ability to correctly diagnose financial planning issues and apply one's knowledge of financial planning to real world circumstances;
- Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and

- Ethics – Agree to be bound by CFP Board’s Standards of Professional Conduct, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- Continuing Education – Complete 30 hours of continuing education hours every two years, including two hours on the Code of Ethics and other parts of the Standards of Professional Conduct, to maintain competence and keep up with developments in the financial planning field; and
- Ethics – Renew an agreement to be bound by the Standards of Professional Conduct. The Standards prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board’s enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

Business History for the Past Five Years

Firm	Position Held	Start Date	End Date
Cascadia Wealth Management	Financial Advisor	01/2019	present
Cascadia Advisory Services, LLC	Investment Advisor Representative	01/2019	present
Trusted Advisors, LLC	Owner	10/2008	present
Security First Advisors	Investment Advisor Representative	05/2003	12/2018

Bill was born in 1971

Disciplinary Information

There are no legal or disciplinary events that are material to a client’s or prospective client’s evaluation of this advisory business.

Other Business Activities

Bill holds a license with the State of Oregon as a life and health agent through which he can offer life insurance, disability policies, annuities, and long-term care coverage. Clients should be aware that these services pay a commission and involve a possible conflict of interest, as commissionable products can conflict with the fiduciary duties of a registered investment adviser. Cascadia Advisory Services, LLC always acts in the best interest of the client; including in the sale of commissionable products to advisory clients. Clients are in no way required to utilize the services any representative of Cascadia Advisory Services, LLC in such individual's outside capacity.

Bill uses Cascadia Wealth Management as a DBA for all of his securities and insurance related activities.

Trusted Advisors, LLC is an entity owned by Bill which he uses for accounting and tax-reporting purposes and is not client-facing.

Additional Compensation

Bill does not receive any economic benefit from any person, company, or organization, other than Cascadia Advisory Services, LLC in exchange for providing clients advisory services through Cascadia Advisory Services, LLC..

Supervision

As a representative of Cascadia Advisory Services, LLC, William Henry Leder, Jr. is supervised by Michael Jeanfreau, the firm's Chief Compliance Officer. Mr. Jeanfreau is responsible for ensuring that Bill adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm’s Code of Ethics and compliance manual. The phone number for Michael Jeanfreau is (503) 620-5236.

Supplement Date: 03/31/2020

Cascadia Advisory Services, LLC

Registered Investment Advisor (RIA)
8050 SW Pfaffle Street, Suite 100
Portland, OR 97223
503-620-5236
info@cascadiawm.com
Firm CRD Number: 290231

Kip Allen Mechals
dba Cascadia Wealth Management

Investment Advisor Representative (IAR)
207 NE 19th Street, Suite 302
McMinnville, OR 97128
503-434-2757
kip@cascadiawm.com
Personal CRD Number: 1983396

This brochure supplement provides information about Kip Allen Mechals that supplements the Cascadia Advisory Services, LLC brochure. You should have received a copy of that brochure. Please contact Mr. Mechals if you did not receive Cascadia Advisory Services, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Kip Allen Mechals is also available on the SEC's website at www.adviserinfo.sec.gov.

Educational Background and Business Experience***Education***

BA Business, Western Oregon State – 1988

Securities Registrations

SERIES 65 - The Uniform Investment Adviser Law (Series 65) qualifies holders as Investment Advisor Representatives.

Professional Designations

None

Business History for the Past Five Years

Firm	Position Held	Start Date	End Date
Cascadia Wealth Management	Financial Advisor	1999	present
Cascadia Advisory Services, LLC	Investment Advisor Representative	02/2018	present
Cetera Advisors LLC	Registered Representative	01/2013	11/2019
Cetera Advisors LLC	Investment Advisor Representative	01/2013	10/2008

Kip was born in 1964

Disciplinary Information

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

Other Business Activities

Kip holds a license with the State of Oregon as a life and health agent through which he can offer life insurance, disability policies, annuities, and long-term care coverage. Clients should be aware that these services pay a commission and involve a possible conflict of interest, as commissionable products can conflict with the fiduciary duties of a registered investment advisor. Cascadia Advisory Services, LLC always acts in the best interest of the client; including in the sale of commissionable products to advisory clients. Clients are in no way required to utilize the services any representative of Cascadia Advisory Services, LLC in such individual's outside capacity.

Kip uses Cascadia Wealth Management as a DBA for all of his securities and insurance related activities.

Kip teaches educational financial workshops in various venues.

Kip is a sports and portrait photographer.

Kip uses Squirrel Group LLC for accounting and tax-reporting purposes. It is not client-facing or a source of revenue.
Kip is a residential real estate landlord.

Additional Compensation

Kip does not receive any economic benefit from any person, company, or organization, other than Cascadia Advisory Services, LLC in exchange for providing clients advisory services through Cascadia Advisory Services, LLC.

Supervision

As a representative of Cascadia Advisory Services, LLC, Kip Allen Mechals is supervised by Michael Jeanfreau, the firm's Chief Compliance Officer. Mr. Jeanfreau is responsible for ensuring that Kip Allen Mechals adheres to all required regulations regarding the activities of an Investment Advisor Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Michael Jeanfreau is (503) 620-5236.

Supplement Date: 03/31/2020

Cascadia Advisory Services, LLC

Registered Investment Advisor (RIA)
8050 SW Pfaffle Street, Suite 100
Portland, OR 97223
503-620-5236
info@cascadiawm.com
Firm CRD Number: 290231

**Douglas Kay Perry, CRPC®
dba Cascadia Wealth Management**

Investment Advisor Representative (IAR)
8050 SW Pfaffle Street, Suite 100
Portland, OR 97223
503-620-5236
doug@cascadiawm.com
Personal CRD Number: 2260883

This brochure supplement provides information about Douglas Kay Perry that supplements the Cascadia Advisory Services, LLC brochure. You should have received a copy of that brochure. Please contact Mr. Perry if you did not receive Cascadia Advisory Services, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Douglas Kay Perry is also available on the SEC's website at www.adviserinfo.sec.gov.

Educational Background and Business Experience***Education***

High School Diploma

Studied Business courses at College of Eastern Utah and Rick's College (now Brigham Young University – Idaho)

Securities Registrations

SERIES 6 - The Investment Company Products/Variable Contracts Limited Representative (Series 6) qualifies a holder for the solicitation, purchase, and/or sale of redeemable securities of companies registered pursuant to the Investment Company Act of 1940; securities of closed-end companies registered pursuant to the investment company act of 1940 during the period of original distribution only; and variable contracts and insurance premium funding programs and other contracts issued by an insurance company.

SERIES 7 - The General Securities Representative (Series 7) qualifies a holder for the solicitation, purchase, and/or sale of all securities products, including corporate securities, municipal securities, municipal fund securities, options, direct participation programs, investment company products, and variable contracts.

SERIES 26 - the Investment Company Products/Variable Contracts Limited Principal (Series 26) qualifies an individual who will function as a principal for the solicitation, purchase, and/or sale of redeemable securities of companies registered pursuant to the Investment Company Act of 1940; securities of closed-end companies registered pursuant to the Investment Company Act of 1940 during the period of original distribution only; and variable contracts and insurance premium funding programs and other contracts issued by an insurance company.

SERIES 63 - The Uniform Securities Agent State Law (Series 63) qualifies holders as securities agents. the examination covers the principles of state securities regulation reflected in the Uniform Securities Act.

SERIES 65 - The Uniform Investment Adviser Law (Series 65) qualifies holders as Investment Adviser Representatives.

Professional Designations

CRPC® - Chartered Retirement Planning CounselorSM - this designation is obtained by completing an online instructor led or self-study course and a final exam. There are no prerequisites. This designation requires 16 hours of continuing education every 2 years.

Business History for the Past Five Years

Firm	Position Held	Start Date	End Date
Cascadia Wealth Management	Financial Advisor Managing Principal	04/2004	present
Cascadia Advisory Services, LLC	Investment Advisor Representative Managing Principal	01/2018	present
Cetera Advisors LLC	Registered Representative	02/2012	present
Cetera Advisors LLC	Investment Adviser Representative	02/2012	10/2018
Perry Financial Group	President	3/1996	present

Doug was born in 1961

Disciplinary Information

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

Other Business Activities

Doug is a registered representative with Cetera Advisors LLC. From time to time, he will offer clients advice or products from this activity. Doug also holds a license with the State of Oregon as a life and health agent through which he can offer life insurance, disability policies, annuities, and long-term care coverage. Clients should be aware that these services pay a commission and involve a possible conflict of interest, as commissionable products can conflict with the fiduciary duties of a registered investment advisor. Cascadia Advisory Services, LLC always acts in the best interest of the client; including in the sale of commissionable products to advisory clients. Clients are in no way required to utilize the services any representative of Cascadia Advisory Services, LLC in such individual's outside capacity.

Doug uses Cascadia Wealth Management as a DBA for all of his securities and insurance related activities.

Perry Financial Group is used for accounting and tax-reporting purposes only, it is not client facing.

Additional Compensation

Doug does not receive any economic benefit from any person, company, or organization, other than Cascadia Advisory Services, LLC in exchange for providing clients advisory services through Cascadia Advisory Services, LLC.

Supervision

As a representative of Cascadia Advisory Services, LLC, Douglas Perry is supervised by Michael Jeanfreau, the firm's Chief Compliance Officer. Michael is responsible for ensuring that Douglas Perry adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. Michael's phone number is (503) 620-5236.

Supplement Date: 03/31/2020

Cascadia Advisory Services, LLC

Registered Investment Advisor (RIA)
 8050 SW Pfaffle Street, Suite 100
 Portland, OR 97223
 503-620-5236
 info@cascadiawm.com
 Firm CRD Number: 290231

**Susan Lepska Schwarz
 dba Cascadia Wealth Management**

Investment Advisor Representative (IAR)
 8050 SW Pfaffle Street, Suite 100
 Portland, OR 97223
 503-620-5236
 susanschwarz@cascadiawm.com
 Personal CRD Number: 5616603

This brochure supplement provides information about Susan Lepska Schwarz that supplements the Cascadia Advisory Services, LLC brochure. You should have received a copy of that brochure. Please contact Ms. Schwarz if you did not receive Cascadia Advisory Services, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Susan Lepska Schwarz is also available on the SEC's website at www.adviserinfo.sec.gov.

Educational Background and Business Experience
Education

MILR Human Resource Management, Cornell University – 1989

BS Human Development, Cornell University – 1983

Securities Registrations

SERIES 6 - The Investment Company Products/Variable Contracts Limited Representative (Series 6) qualifies a holder for the solicitation, purchase, and/or sale of redeemable securities of companies registered pursuant to the Investment Company Act of 1940; securities of closed-end companies registered pursuant to the investment company act of 1940 during the period of original distribution only; and variable contracts and insurance premium funding programs and other contracts issued by an insurance company.

SERIES 7 - The General Securities Representative (Series 7) qualifies a holder for the solicitation, purchase, and/or sale of all securities products, including corporate securities, municipal securities, municipal fund securities, options, direct participation programs, investment company products, and variable contracts.

SERIES 63 - The Uniform Securities Agent State Law (Series 63) qualifies holders as securities agents. The examination covers the principles of state securities regulation reflected in the Uniform Securities Act.

SERIES 65 - The Uniform Investment Adviser Law (Series 65) qualifies holders as Investment Adviser Representatives.

Professional Designations

None

Business History for the Past Five Years

Firm	Position Held	Start Date	End Date
Cascadia Wealth Management	Financial Advisor	3/2013	present
Cascadia Advisory Services, LLC	Investment Advisor Representative	9/2018	present
Cetera Advisors LLC	Registered Representative	3/2013	present
Cetera Advisors LLC	Investment Advisor Representative	3/2013	12/2018
NuSkin	NuSkin Brand Affiliate	3/2008	present
Susan Schwarz, Executive Coach	Executive Coach	1/2002	present

Susan was born in 1961

Disciplinary Information

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

Other Business Activities

Susan is a registered representative with Cetera Advisors LLC. From time to time, she will offer clients advice or products from this activity. Susan also holds a license with the State of Oregon as a life and health agent through which he can offer life insurance, disability policies, annuities, and long-term care coverage. Clients should be aware that these services pay a commission and involve a possible conflict of interest, as commissionable products can conflict with the fiduciary duties of a registered investment advisor. Cascadia Advisory Services, LLC always acts in the best interest of the client; including in the sale of commissionable products to advisory clients. Clients are in no way required to utilize the services any representative of Cascadia Advisory Services, LLC in such individual's outside capacity.

Susan uses Cascadia Wealth Management as a DBA for all of her securities and insurance related activities.

Susan is a NuSkin Brand Affiliate and earns commission from product sales. Though these activities are independent and not related, from time to time, Susan may offer her advisory clients products from NuSkin. Clients always have the right to decide whether or not to utilize the services of any representative of Cascadia Advisory Services, LLC in such individual's outside capacities.

Susan Lepska Schwarz is an Executive Coach at Susan Schwarz, Executive Coach and earns income from contracts with clients. From time to time, she may offer clients advice or products from those activities and clients should be aware that these services may involve a conflict of interest. Cascadia Advisory Services, LLC always acts in the best interest of the client and clients always have the right to decide whether or not to utilize the services of any representative of Cascadia Advisory Services, LLC in such individual's outside capacities.

Additional Compensation

Susan Lepska Schwarz does not receive any economic benefit from any person, company, or organization, other than Cascadia Advisory Services, LLC in exchange for providing clients advisory services through Cascadia Advisory Services, LLC..

Supervision

As a representative of Cascadia Advisory Services, LLC, Susan Lepska Schwarz is supervised by Michael Jeanfreau, the firm's Chief Compliance Officer. Mr. Jeanfreau is responsible for ensuring that Susan adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Michael Jeanfreau is (503) 620-5236.