



FORM ADV, PART 2B BROCHURE SUPPLEMENT

KELLY L. ST. GEORGE
DECEMBER 16, 2020

COLORADO WEALTH GROUP, LLC
1345 S. BROADWAY
DENVER, CO 80210
720-729-2500
WWW.COLORADOWEALTHGROUP.COM

This Brochure Supplement provides information about Kelly St. George (CRD# 5793325) that supplements the Disclosure Brochure for Colorado Wealth Group, LLC, a copy of which you should have received. Please contact the Chief Compliance Officer at (720) 729-2500 if you did not receive the Disclosure Brochure or if you have any questions about the contents of this Brochure Supplement. Additional information about Kelly L. St. George is available on the SEC's website at www.advisorinfo.sec.gov.

ITEM 2 – EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Kelly L. St. George

Born: 1965

POST-SECONDARY EDUCATION

- Colorado State University | M.B.A | 2013
- Denver University | B.A. in Psychology | 1992
- Insurance License: Life, health & fixed annuities

RECENT BUSINESS BACKGROUND

- Colorado Wealth Group, LLC | Investment Adviser Representative | November 2020 – Present
- Presidential Wealth Management | Registered Representative/ Insurance Agent | March 2019 – November 2020
- New York Life | Registered Representative/ Insurance Agent | January 2014 – March 2019

ITEM 3 – DISCIPLINARY INFORMATION

Kelly L. St. George has no history of any legal or disciplinary events that deems to be material to a client's consideration of Ms. St. George to act as their investment adviser representative. FINRA's BrokerCheck® may have additional information regarding the disciplinary history of Kelly St. George that is not included in this brochure supplement. <https://www.adviserinfo.sec.gov/>

ITEM 4 – OTHER BUSINESS ACTIVITIES

Kelly L. St. George is a licensed insurance agent. It is anticipated that a small portion, less than (25%) of her time, will be spent providing these insurance products. In such capacity, she offers insurance products and receives normal and customary commissions as a result of any purchases made by clients. The client is under no obligation to purchase insurance through Kelly St. George on a commissionable basis. The potential for receipt of commissions and other compensation gives her incentive to recommend insurance products based on the compensation received, rather than on the client's needs. To address this, disclosure is made to the client at the time purchase is made, identifying the nature of the transaction or relationship, the role to be played and any compensation (e.g., commissions, trails) to be paid by the client and/or received by the insurance agent.

Kelly L. St. George is a licensed mortgage broker with Far East Financial. She provides residential mortgage lending advice, originations and receives a commission for loans closed in that capacity. This is a non-investment entity in which Ms. St. George spends less than 10% of her time each month.

Kelly L. St. George is a Zumba instructor. She receives compensation for this activity and spends less than 5% of her time in her role.

ITEM 5 – ADDITIONAL COMPENSATION

Kelly L. St. George does not receive any economic benefit for providing advisory services beyond the scope of Colorado Wealth Group, LLC and business activities listed in Item 4.

ITEM 6 – SUPERVISION

Kelly L. St. George is supervised through a compliance program designed to prevent and detect violations of the federal and state securities laws. Supervision is conducted by the Chief Compliance Officer, Jacob Ray, who is responsible for administering the policies and procedures. Jacob Ray reviews those policies and procedures annually for their adequacy and the effectiveness of their implementation. All policies and procedures of the firm are followed. Jacob B. Ray can be reached at 720-729-2500 or JRay@ColoradoWealthGroup.com.

ITEM 7 - REQUIREMENTS FOR STATE-REGISTERED ADVISERS

Kelly L. St. George has not been involved in or found liable in an arbitration claim or civil, self-regulatory organization or administrative proceeding alleging damages in excess of \$2,500, involving an investment or an investment-related business or activity; fraud, false statement(s), or omissions; theft, embezzlement, or other wrongful taking of property; bribery, forgery, counterfeiting, or extortion; or dishonest, unfair, or unethical practices.

Kelly L. St. George has been the subject of a bankruptcy petition in 2005. To the best of our ability all material conflicts of interest are disclosed regarding the Firm, its representatives or any of its employees, which could be reasonably expected to impair the rendering of unbiased and objective advice.