



FORM ADV, PART 2B BROCHURE SUPPLEMENT

JEREMY M. PHILLIPS
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 Jeremy M. Phillips (CRD# 6661282) 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 Jeremy M. Phillips is available on the SEC's website at www.advisorinfo.sec.gov.

ITEM 2 – EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Jeremy M. Phillips

Born: 1994

POST-SECONDARY EDUCATION

- Saint Louis University | B.S. in Business Administration – Finance | 2016
- Insurance License: Accident, Health, Life

RECENT BUSINESS BACKGROUND

- Colorado Wealth Group, LLC | Investment Adviser Representative | August 2020 – Present
- Mass Mutual Investor Services | Registered Representative | May 2019 – August 2020
- Mass Mutual Life Insurance Company | April 2019 – August 2020
- Stifel Nicolaus | Operations Technician | June 2018 – January 2019
- Stifel Nicolaus | Senior Operations Specialist | June 2017 – May 2018
- Stifel Nicolaus | Operations Specialist | June 2016 – May 2017

ITEM 3 – DISCIPLINARY INFORMATION

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

ITEM 4 – OTHER BUSINESS ACTIVITIES

Jeremy M. Phillips is a licensed insurance agent. It is anticipated that a small portion, less than (10%) of his time, will be spent providing these insurance products. In such capacity, he 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 Jeremy Phillips on a commissionable basis. The potential for receipt of commissions and other compensation gives him 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.

ITEM 5 – ADDITIONAL COMPENSATION

Jeremy M. Phillips 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

Jeremy M. Phillips 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

Jeremy M. Phillips 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.

Jeremy M. Phillips has not been the subject of a bankruptcy petition. 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.