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## **Part 2B of Form ADV Disclosure Brochure**

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This brochure supplement provides information about Jennifer E. Myers, Michael Fuhr, and Ryan Phillips. It supplements SageVest's accompanying Form ADV brochure. You should have received a copy of that brochure. Please contact SageVest's Chief Compliance Officer, Jennifer E. Myers at 703-992-7650 if you have any questions about the Form ADV brochure or this supplement, or if you would like to request additional or updated copies of either document.

Additional information about all of SageVest's advisors is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

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## Key Employee Biographical Information

### Education and Business Standards

SageVest requires individuals involved in determining or giving investment advice to clients to have appropriate educational credentials and experience, including:

1. Have work experience that demonstrates their aptitude for financial planning and investment management.
2. Be a graduate of an accredited four-year college.
3. Hold the Series 65 Investment Adviser Representative license or its equivalent.
4. Hold or be pursuing one of the following designations: Certified Financial Planner™ (CFP®), Chartered Financial Consultant® (ChFC®), Certified Financial Analyst (CFA), or Certified Public Accountant (CPA).
5. Subscribe to the Code of Ethics of the CFP Board of Standards.
6. Be properly licensed for all advisory activities in which they are engaged.

### Professional Certifications

Our advisors have earned certifications and credentials that are required to be explained in further detail. We have listed the certifications and credentials held by our investment advisors and financial planners below:

**CERTIFIED FINANCIAL PLANNER™ (CFP®):** To attain the right to use 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 an accredited college or 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 10-hour CFP® Certification Exam
- Experience – Complete at least three years of full-time financial planning-related experience
- Ethics – Agree to be bound by CFP Board's *Standards of Professional Conduct*.

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*
- Ethics – Renew an agreement to be bound by the *Standards of Professional Conduct*

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## **Jennifer E. Myers, CFP<sup>®</sup>, President, Investment Committee Chair, Chief Compliance Officer**

Jennifer E. Myers, CFP<sup>®</sup> serves as President of SageVest. With more than two decades of experience in the financial industry, Jennifer works with clients to help them fulfill their life and family goals, while translating complex financial matters into understandable, manageable and successful strategies. She serves as Chair of the firm's Investment Committee and maintains close working relationships with clients to ensure that investment portfolios and broader financial objectives remain closely aligned.

Jennifer has repeatedly been named as a Top Fee-Only Advisor by The Washingtonian and Northern Virginia Magazine, and as a Five Star Wealth Manager by Five Star Professionals. (Please see our website for award disclosures.) She has appeared on television and has been quoted in The Washington Post, CNBC, Kiplinger, US News and World Report, Investopedia, Yahoo Finance, CNN Money, NASDAQ, NPR's 'Marketplace', The Journal of Financial Planning, and a host of other national publications. Jennifer has also spoken on a variety of financial planning topics ranging from broad planning initiatives to more discrete topics such as wealth transfer planning, financial values, children and money, and women's financial planning considerations.

Her professional affiliations include membership in the Financial Planning Association and the Washington, DC Estate Planning Council, of which she previously served as an officer and director, among other positions within the Council. In the community, she has been a member of the Women's Business Giving Circle at the Community Foundation for Northern Virginia and the Washington Women's Leader Initiative. She also previously tutored inner-city children at Project Northstar.

Prior to establishing SageVest, Jennifer served as partner and vice president of Freed Myers, a wealth management firm in Chevy Chase, MD. She also provided financial and business analysis for Unisys and the U.S. Postal Service.

Jennifer was born in Stoughton, MA in 1972, and currently resides in McLean, VA. She received her Bachelors in Business Administration (BBA) and Masters in Business Administration (MBA) from The George Washington University. She also received the Certified Financial Planner (CFP<sup>®</sup>) professional designation from the CFP Board of Standards.

### **Disciplinary Information**

Ms. Myers has not been involved in any legal or disciplinary events.

### **Other Business Activities**

Ms. Myers is not engaged in any other investment related business, and does not receive compensation in connection with any business activity outside of SageVest.

### **Additional Compensation**

Ms. Myers does not receive economic benefits from any person or entity other than SageVest.

### **Supervision**

Ms. Myers conducts supervision of all activities conducted by SageVest. Like all employees of SageVest Wealth Management, Ms. Myers is required to follow the supervisory guidelines and procedures manual, which is designed to ensure compliance with applicable security laws.

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## **Susan Hamilton, CFP<sup>®</sup>, Financial Advisor**

Susan E. Hamilton, CFP<sup>®</sup>, partners with clients to design comprehensive investment and planning strategies that recognize their unique personal and financial goals. As a CERTIFIED FINANCIAL PLANNER<sup>™</sup> with three decades of experience in the financial services industry, Susan enjoys building long lasting client relationships, using her background in investments and financial planning to add value to clients through thoughtful financial advice.

Susan is a member of the Financial Planning Association (FPA) and the Washington Women's Financial Planning Study Group. She actively supports various FPA pro bono financial counseling programs and worked directly with families impacted by the September 11th terrorist attacks on the Pentagon, as well as service members injured in combat in the Middle East at Walter Reed Army Medical Center. In the community, Susan has been involved with Fairfax Pets on Wheels, Rebuilding Together, and volunteers with animal rescue groups.

Prior to joining SageVest, Susan had extensive experience working for a national brokerage firm, an institutional money manager and several fee-only registered investment advisors.

Susan was born in Long Beach, CA in 1961 and currently resides in Annandale, VA. She graduated from the University of Virginia with a Bachelor of Arts (BA) in Foreign Affairs and later received the CERTIFIED FINANCIAL PLANNER<sup>™</sup> (CFP<sup>®</sup>) professional designation from the CFP<sup>®</sup> Board of Standards.

### **Disciplinary Information**

Ms. Hamilton has not been involved in any legal or disciplinary events.

### **Other Business Activities**

Ms. Hamilton is not engaged in any other investment related business, and does not receive compensation in connection with any business activity outside of SageVest.

### **Additional Compensation**

Ms. Hamilton does not receive economic benefits from any person or entity other than SageVest.

### **Supervision**

Ms. Hamilton's recommendations are reviewed by Jennifer. Ms. Myers can be reached by calling the telephone number on the cover of this brochure supplement. All employees of SageVest Wealth Management are required to follow the supervisory guidelines and procedures manual, which is designed to ensure compliance with applicable security laws.

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## **Matthew Ryan Albritton (Ryan), CFP<sup>®</sup>, AIF<sup>®</sup>, Financial Advisor**

Ryan Albritton, CFP<sup>®</sup>, AIF<sup>®</sup>, specializes in collaborating with clients to align their life goals with their financial strategies, whether they are in the beginning stages of their career, planning for their families, or embarking on retirement. Ryan sees the individuality in each client. He enjoys advocating for them and crafting personalized financial management plans that will work in their best interests.

Prior to joining SageVest, Ryan had extensive experience working for a national financial services firm, a national wealth management company, and a fee-only registered investment advisory firm. Serving as a financial advisor and business owner for many years, Ryan provides clients with wide-ranging expertise through all of life's milestones.

Outside of work, Ryan enjoys community involvement. He's a volunteer and advisor with Ellie's Hat, an organization benefiting children with cancer. Ryan and his wife also enjoy coaching youth basketball, helping young players develop strong fundamentals and character on and off the court.

Ryan was born in Fayetteville, NC in 1985 and currently resides in Aldie, VA. Ryan graduated from George Mason University with a Bachelor of Science Degree in Public Administration. He has received the CERTIFIED FINANCIAL PLANNER<sup>™</sup> (CFP<sup>®</sup>) professional designation from the CFP<sup>®</sup> Board of Standards, and the ACCREDITED INVESTMENT FIDUCIARY AIF<sup>®</sup> certification issued by Fi360.

### **Disciplinary Information**

Mr. Albritton has not been involved in any legal or disciplinary events.

### **Other Business Activities**

Mr. Albritton is not engaged in any other investment related business, and does not receive compensation in connection with any business activity outside of SageVest.

### **Additional Compensation**

Mr. Albritton does not receive economic benefits from any person or entity other than SageVest.

### **Supervision**

Mr. Albritton's recommendations are reviewed by Jennifer. Ms. Myers can be reached by calling the telephone number on the cover of this brochure supplement. All employees of SageVest Wealth Management are required to follow the supervisory guidelines and procedures manual, which is designed to ensure compliance with applicable security laws.

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## **Anthony Matteo, Financial Associate**

Anthony serves as a Financial Associate with SageVest Wealth Management, helping with a variety of planning, investment and account servicing functions. Anthony works closely with SageVest's advisors to prepare for client meetings, conduct research on investment and planning topics, initiate planning activities and facilitate trading. He also works closely with clients to gather appropriate financial information and communicate various financial and account updates.

Anthony joined SageVest Wealth Management post his graduation from Virginia Polytechnic Institute and State University where he earned a Bachelor of Science (BS) in Finance, with a concentration in financial planning. He passed the CERTIFIED FINANCIAL PLANNER™ exam and is currently working on obtaining his experience requirements.

Anthony was born in Freehold, NJ in 1997 and currently resides in Arlington, VA.

### **Disciplinary Information**

Mr. Matteo has not been involved in any legal or disciplinary events.

### **Other Business Activities**

Mr. Matteo is not engaged in any other investment related business, and does not receive compensation in connection with any business activity outside of SageVest.

### **Additional Compensation**

Mr. Matteo does not receive economic benefits from any person or entity other than SageVest.

### **Supervision**

Mr. Matteo's recommendations are reviewed by Jennifer. Ms. Myers can be reached by calling the telephone number on the cover of this brochure supplement. All employees of SageVest Wealth Management are required to follow the supervisory guidelines and procedures manual, which is designed to ensure compliance with applicable security laws.