



Part 2B of Form ADV Disclosure Brochure

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Updated: March 28, 2022

This brochure supplement provides information about Jennifer E. Myers, Dan Serra, Ryan Albritton and Anthony Matteo. 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.

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*

Accredited Investment Fiduciary (AIF®)

- Education – Enroll in and complete AIF® training that satisfied AIF training requirements or PPC® training that satisfies PPC® training requirements
- Examination – Pass the AIF® training examination
- Experience – One of the following combinations of education, industry experience, and/or professional development is required to meet the experience requirement for the Accredited Investment Fiduciary® (AIF®) Designation and/or Professional Plan Consultant® (PPC®)

Designation. Relevant experience is that which has been accrued in a non-clerical role within the financial services (or a related) industry.

- Minimum of two (2) years of relevant experience; a bachelor's degree (or higher); and a professional credential.
- Minimum of five (5) years of relevant experience; a bachelor's degree (or higher) or a professional credential.
- Minimum of eight (8) years of relevant experience.
- Ethics – Satisfy the Code of Ethics and Conduct Standards

The following steps must be completed annually in order to retain the AIF® Designation:

- Accrue and report six (6) hours of continuing education (CE), four of which must be delivered by Fi360 or one of Fi360's approved CE providers.
- Satisfy the Code of Ethics and Conduct Standards

Certified Divorce Financial Analyst (CDFA™)

The Certified Divorce Financial Analyst™, (CDFA™) is a professional certification granted by the Institute for Divorce Financial Analysts™ (IDFA™). To attain the right to use the CDFA™ (Certified Divorce Financial Analyst™) certification, an individual must satisfactorily fulfill the following requirements:

- Education – Professionals must develop their theoretical understanding and knowledge of the financial aspects of divorce by completing a comprehensive course of study approved by the IDFA™;
- Examination – Practitioners must pass a four-part Certification Examination that tests their understanding and knowledge of the financial aspects of divorce. In addition, the practitioner must demonstrate the practical application of this knowledge in the divorce process;
- Experience – Individuals must have a minimum of three years' experience in a financial or legal capacity prior to earning the right to use the CDFA™ certification mark; and
- Ethics – Practitioners agree to abide by a strict code of professional conduct known as the "Code of Ethics and Professional Responsibility," which sets forth their ethical responsibilities to the public, clients, employers and other professionals. The IDFA™ may perform a background check during this process, and each candidate for CDFA™ certification must disclose any investigations or legal proceedings relating to his or her professional or business conduct. Individuals who become certified must complete the following ongoing education requirements in order to maintain the right to continue to use the CDFA™ designation:
 - Continuing Education – Complete a minimum of fifteen (15) hours of continuing education every two years, that are specifically related to the field of divorce, and
 - Ethics – Practitioners must voluntarily disclose any public, civil, criminal, or disciplinary actions that may have been taken against them during the past two years as part of the renewal process. If a complaint has been brought against a CDFA™ by another professional or member of the general public, the CDFA™ must be examined and cleared by IDFA's Ethics Committee to maintain their designation.

The Accredited Domestic Partnership Advisor (ADPA®)

An Accredited Domestic Partnership Advisor (SM) or ADPA® is a professional designation provided by The College for Financial Planning. Individuals who hold the ADPA® designation have completed a course of study encompassing wealth transfers, federal taxation, retirement planning, and planning for financial and medical end-of-life needs for domestic partners. Additionally, individuals must pass an end-of-course examination that tests their ability to synthesize complex concepts and apply theoretical concepts to real-life situations. All designees have agreed to adhere to Standards of Professional Conduct and are subject to a disciplinary process. Designees renew their designation every two-years by

completing 16 hours of continuing education, reaffirming adherence to the Standards of Professional Conduct and complying with self-disclosure requirements.

Enrolled Agent (EA)

An Enrolled Agent (EA) is a federally - authorized tax practitioner who has technical expertise in the field of taxation and who is empowered by the U.S. Department of the Treasury to represent taxpayers before all administrative levels of the Internal Revenue Service for audits, collections, and appeals. "Enrolled" means to be licensed to practice by the federal government, and "Agent" means authorized to appear in the place of the taxpayer at the IRS. Only Enrolled Agents, attorneys, and CPAs may represent any taxpayer before the IRS. The license is earned in one of two ways: by passing a comprehensive examination which covers all aspects of the tax code, or having worked at the IRS for five years in a position which regularly interpreted and applied the tax code and its regulations. All candidates are subjected to a rigorous background check conducted by the IRS. In addition to the stringent testing and application process, the IRS requires Enrolled Agents to complete 72 hours of continuing professional education, reported every three years, to maintain their Enrolled Agent status. Unlike attorneys and CPAs, who may or may not choose to specialize in taxes, all Enrolled Agents specialize in taxation. Enrolled Agents receive their right to practice from the U.S. government (CPAs and attorneys are licensed by the states). Enrolled Agents are required to abide by the provisions of the Department of Treasury's Circular 230, which provides the regulations governing the practice of Enrolled Agents before the IRS.

Jennifer E. Myers, CFP[®], President, Investment Committee Chair, Chief Compliance Officer

Jennifer E. Myers, CFP[®] 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, The National Association of Personal Financial Advisors the Northern Virginia Estate Planning Council and the Washington, DC Estate Planning Council, of which she previously served as an officer and director. 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.

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[®]) 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.

Daniel Serra, CFP[®], CDFA[™], ADPA[®], EA, Senior Financial Advisor

Daniel A. Serra, CFP[®], integrates financial planning strategies custom to each individual and family to align with their values and goals, educating clients to make smart financial decisions. He brings additional skills on the intricacies of a variety of family structures to better serve blended family, divorced, widowed, unmarried and LGBT clients, whether starting out in life or managing a secure retirement.

Along with his CERTIFIED FINANCIAL PLANNER[®] professional designation, Dan holds designations as a Certified Divorce Financial Analyst (CDFA[™]) to understand the financial aspects of divorce, Accredited Domestic Partnership Advisor (ADPA[®]) to advise on wealth transfers, taxes, retirement planning, and financial needs for domestic partners and the LGBT community, and Enrolled Agent (EA) to be recognized by the Internal Revenue Service as having expertise in taxation.

The breadth of his educational and professional experience brings significant depth to each client relationship. Dan prides himself in communicating complex financial matters in clear terms, communicating key takeaways that translate into real life decisions.

Prior to joining SageVest, Dan had extensive experience with an investment management and trust services firm, as well as a fee-only registered investment advisory firm.

Outside of work, Mr. Serra teaches financial planning courses for Southern New Hampshire University, serves on the advisory board for the Journal of Financial Planning, is an active member of the Financial Planning Association and The National Association of Personal Financial Advisors. He also volunteers with various youth sports organizations.

Dan was born in St. Petersburg, FL in 1965. He graduated from the University of South Florida with a Bachelor of Arts degree and the College for Financial Planning with a master's degree in Personal Financial Planning.

Disciplinary Information

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

Other Business Activities

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

Supervision

Mr. Serra is supervised by Jennifer Myers. Dan 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.

Matthew Ryan Albritton (Ryan), CFP[®], AIF[®], Financial Advisor, Investment Committee Co-Chair

Ryan Albritton, CFP[®], AIF[®], holds more than a decade of experience 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.

As Co-Chair of the Investment Committee, Ryan actively evaluates ongoing investment research activities, helping to make ultimate decisions on investment strategy and the implementation of such. Ryan also coordinates client trading efforts.

Ryan is affiliated with The National Association of Personal Financial Advisors.

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 graduated from George Mason University with a Bachelor of Science Degree in Public Administration. He has received the CERTIFIED FINANCIAL PLANNER[™] (CFP[®]) professional designation from the CFP[®] Board of Standards, and the ACCREDITED INVESTMENT FIDUCIARY AIF[®] certification issued by Fi360.

Ryan was born in Fayetteville, NC in 1985 and currently resides in Aldie, VA.

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 is supervised by Jennifer Myers. Ryan 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.

Anthony Matteo, CFP®, Financial Advisor

Anthony Matteo, CFP®, serves as a Financial Advisor with SageVest Wealth Management. He works closely with clients to understand their financial goals, gather appropriate financial information, prepare planning projections, evaluate appropriate financial strategies, review tax considerations and align strategies with client investment portfolios. Anthony effectively communicates various financial and account updates, ensuring strategies are presented in clear terms to meet the client's goals.

As a member of the Investment Committee Anthony conducts research and participates in quarterly investment meetings. Anthony oversees investment management reporting efforts for SageVest clients.

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 received the CERTIFIED FINANCIAL PLANNER™ (CFP®) professional designation from the CFP® Board of Standards.

Anthony is an active member of the Financial Planning Association (FPA). He is also affiliated with The National Association of Personal Financial Advisors.

Outside of work, Anthony is an avid sports enthusiast, particularly of baseball.

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 is supervised by Jennifer Myers. Anthony 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.