Item 1- Cover Page

Lily Beitel-Horton

Sequoia Financial Advisors, LLC

2300 Broadway Street
Boulder, CO 80304

383 Inverness Pkwy Ste. 405
Englewood, CO 80112

1-888-225-3777

www.sequoia-financial.com

July 2026

This Brochure Supplement provides information about Lily Beitel-Horton that supplements the Sequoia Financial Advisors, LLC Form ADV Part 2A Brochure. You should have received a copy of the Form ADV Part 2A Brochure. Please contact Lily Beitel-Horton at our office at (888) 225-3777 if you did not receive Sequoia Financial Advisor's Form ADV Part 2A Brochure or if you have any questions about the contents of this supplement.

Additional information about Lily Beitel-Horton is available on the SEC's website at www.adviserinfo.sec.gov and FINRA's website at www.finra.org/brokercheck.

Item 2 - Educational Background and Business Experience

Lily Beitel-Horton

Year of Birth:

- 1991

Education:

- B.A. – The George Washington University, 2013
- Series 7, Series 66, and Series 3 securities licenses

Examinations and Professional Designations:

- CERTIFIED FINANCIAL PLANNER™ practitioner (CFP®) – October 2020

CFP®-CERTIFIED FINANCIAL PLANNER™

I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER® professional or a CFP® professional, and I may use these and the other certification marks (the "CFP Board Certification Marks") that Certified Financial Planner Board of Standards Center for Financial Planning, Inc. has licensed to CFP Board in the United States. The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at www.cfp.net.

CFP® professionals have met CFP Board's high standards for education, examination, experience, and ethics. To become a CFP® professional, an individual must fulfill the following requirements:

- **Education** – Earn a bachelor's degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials. CFP Board implemented the bachelor's degree or higher requirement in 2007 and the financial planning development capstone course requirement in March 2012. Therefore, a CFP® professional who first became certified before those dates may not have earned a bachelor's or higher degree or completed a financial planning development capstone course.
- **Examination** – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual's ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.
- **Experience** – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.
- **Ethics** – Satisfy the Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement and agree to be bound by CFP Board's Code of Ethics and Standards of Conduct ("Code and Standards"), which sets forth the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements to remain certified and maintain the right to continue to use the CFP Board Certification Marks:

- **Ethics** – Commit to complying with CFP Board's Code and Standards. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.
- **Continuing Education** – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

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 Background:

- Wealth Advisor – Sequoia Financial Group, LLC – July 2026 to Present
- Financial Advisor, Associate Advisor – BSW Wealth Partners – November 2020 to Present
- Financial Advisor – UBS Financial Services, Inc. – June 2016 to November 2020
- Client Service Associate – Merrill Lynch Bank of America Corporation – June 2015 to September 2015
- Analyst – Barclays Wealth and Investment Management – June 2013 to June 2015

Item 3 - Disciplinary Information

Registered Investment Advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice.

Lily Beitel-Horton has no disciplinary record that would impact a client's evaluation of the practice.

Item 4 - Other Business Activities

Lily Beitel-Horton is a Wealth Advisor with Sequoia Financial Group, LLC, the Parent Company and affiliated financial services firm of Sequoia Financial Advisors, LLC. Ms. Beitel-Horton serves on the Investment Committee of the Community Foundation Boulder County and does not receive compensation for this service.

Item 5 - Additional Compensation

As a Wealth Advisor with Sequoia Financial Group, LLC, Lily Beitel-Horton receives a salary and is eligible to receive a bonus.

Item 6 - Supervision

Supervision and oversight of Lily Beitel-Horton is completed by Tom Neroni, or appropriate delegate. Sequoia conducts periodic reviews to ensure systems are in place to provide safeguards against inadvertent violation of laws, rules and regulations.

Lily Beitel-Horton is an Investment Advisor Representative with Sequoia Financial Advisors, LLC. Sequoia Financial Advisors, LLC's President provides oversight of the team responsible for the investment and portfolio management process, in addition to the financial planning process of Sequoia Financial Advisors, LLC. Sequoia Financial Advisors, LLC's Investment Committee establishes the firm's general investment policy and strategy, plus sets guidelines on the overall products and services that are provided to advisory clients. The firm's Investment Committee accepts and implements investment strategies.

Sequoia Financial Advisors, LLC's President, Annelise McCauley, and Tom Neroni, may be contacted by calling 1-888-225-3777.

Item 1- Cover Page

Kathrin Biscornet

Sequoia Financial Advisors, LLC

2300 Broadway Street
Boulder, CO 80304

383 Inverness Pkwy Ste. 405
Englewood, CO 80112

1-888-225-3777

www.sequoia-financial.com

July 2026

This Brochure Supplement provides information about Kathrin Biscornet that supplements the Sequoia Financial Advisors, LLC Form ADV Part 2A Brochure. You should have received a copy of the Form ADV Part 2A Brochure. Please contact Kathrin Biscornet at our office at (888) 225-3777 if you did not receive Sequoia Financial Advisor's Form ADV Part 2A Brochure or if you have any questions about the contents of this supplement.

Additional information about Kathrin Biscornet is available on the SEC's website at www.adviserinfo.sec.gov and FINRA's website at www.finra.org/brokercheck.

Item 2 - Educational Background and Business Experience

Kathrin Biscornet

Year of Birth:

- 1987

Education:

- B.S. in Economics – University of Geneva, 2012
- Series 65 securities license

Examinations and Professional Designations:

- CERTIFIED FINANCIAL PLANNER™ practitioner (CFP®) – 2017

CFP®-CERTIFIED FINANCIAL PLANNER™

I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER® professional or a CFP® professional, and I may use these and the other certification marks (the "CFP Board Certification Marks") that Certified Financial Planner Board of Standards Center for Financial Planning, Inc. has licensed to CFP Board in the United States. The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at www.cfp.net.

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- **Experience** – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.
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- **Continuing Education** – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

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 Background:

- Wealth Advisor – Sequoia Financial Group, LLC – July 2026 to Present
- Director – Financial Planning – BSW Wealth Partners – January 2021 to Present
- Financial Planner – BSW Wealth Partners – August 2018 to December 2021
- Associate Advisor – Diversified Asset Management, Inc. – February 2017 to July 2018
- e-Banking Support Line Advisor – UBS Switzerland – May 2008 to May 2010
- Trainee – UBS Switzerland – September 2006 to February 2008

Item 3 - Disciplinary Information

Registered Investment Advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice.

Kathrin Biscornet has no disciplinary record that would impact a client's evaluation of the practice.

Item 4 - Other Business Activities

Kathrin Biscornet is a Wealth Advisor with Sequoia Financial Group, LLC, the Parent Company and affiliated financial services firm of Sequoia Financial Advisors, LLC.

Item 5 - Additional Compensation

As a Wealth Advisor with Sequoia Financial Group, LLC, Kathrin Biscornet receives a salary and is eligible to receive a bonus.

Item 6 - Supervision

Supervision and oversight of Kathrin Biscornet is completed by Tom Neroni, or appropriate delegate. Sequoia conducts periodic reviews to ensure systems are in place to provide safeguards against inadvertent violation of laws, rules and regulations.

Kathrin Biscornet is an Investment Advisor Representative with Sequoia Financial Advisors, LLC. Sequoia Financial Advisors, LLC's President provides oversight of the team responsible for the investment and portfolio management process, in addition to the financial planning process of Sequoia Financial Advisors, LLC. Sequoia Financial Advisors, LLC's Investment Committee establishes the firm's general investment policy and strategy, plus sets guidelines on the overall products and services that are provided to advisory clients. The firm's Investment Committee accepts and implements investment strategies.

Sequoia Financial Advisors, LLC's President, Annelise McCauley, and Tom Neroni, may be contacted by calling 1-888-225-3777.

Item 1- Cover Page

Tami Carroll

Sequoia Financial Advisors, LLC

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1-888-225-3777

www.sequoia-financial.com

July 2026

This Brochure Supplement provides information about Tami Carroll that supplements the Sequoia Financial Advisors, LLC Form ADV Part 2A Brochure. You should have received a copy of the Form ADV Part 2A Brochure. Please contact Tami Carroll at our office at (888) 225-3777 if you did not receive Sequoia Financial Advisor's Form ADV Part 2A Brochure or if you have any questions about the contents of this supplement.

Additional information about Tami Carroll is available on the SEC's website at www.adviserinfo.sec.gov and FINRA's website at www.finra.org/brokercheck.

Item 2 - Educational Background and Business Experience

Tami Carroll

Year of Birth:

- 1985

Education:

- M.B.A. – Regis University, 2012
- B.S. in Finance – University of Denver, 2009

Examinations and Professional Designations:

- Chartered SRI Counselor™ (CSRIC™) – 2021
- CERTIFIED FINANCIAL PLANNER™ practitioner (CFP®) – 2015
- Certified Divorce Financial Analysts® (CDFA™) – 2019
- Retirement Income Certified Professional® (RICP®) – 2016

CSRIC™ – CHARTERED SRI COUNSELOR™

The Chartered SRI Counselor™ designation was developed in partnership between the College for Financial Planning and US SIF, The Forum for Sustainable and Responsible Investment. The CSRIC™ designation is the first major financial credential dedicated specifically to socially responsible investing.

To secure the right to use the CSRIC™ designation, the individual must complete an online educational program through the College for Financial Planning and passed an examination. Topics include sustainable, responsible, and impact investing (SRI), environmental, social and governance (ESG) metrics, shareholder advocacy and fiduciary responsibilities

The designation holder is also required to maintain the designation by completing 16 hours of continuing education every 2 years.

CFP®-CERTIFIED FINANCIAL PLANNER™

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- **Examination** – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual's ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.
- **Experience** – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.
- **Ethics** – Satisfy the Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement and agree to be bound by CFP Board's Code of Ethics and Standards of Conduct ("Code and Standards"), which sets forth the ethical and practice standards for CFP® professionals.

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- **Continuing Education** – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

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.

CDFA™ – CERTIFIED DIVORCE FINANCIAL ANALYST®

The Institute for Divorce Financial Analysts sponsors this program. A CDFA™ has a background in financial planning, accounting, or legal matters and completes a training program to become skilled at analyzing and providing expertise on the financial issues of divorce. The program consists of a comprehensive self-study course covering topics such as valuing and dividing property, retirement plans and pensions, tax problems and solutions, splitting the house, and financial implications of divorce settlement proposals.

Prerequisites/Experience Required:

- Bachelor's degree with three years of on-the-job experience; or
- no bachelor's degree, five years of relevant experience

Educational Requirements: Candidate must

- complete three exams and

- a comprehensive case study on the financial, tax, and legal issues of divorce

Examination Type: Proctored final exam
Continuing Education/Experience Requirements: 30 divorce-related hours every two years

RICP® – RETIREMENT INCOME CERTIFIED PROFESSIONAL®

Retirement Income Certified Professional (RICP) is an advanced designation appropriate for individuals working in the retirement income planning field and for those with a general background in financial services.

Prerequisite/Experience Required

- Three years of professional experience

Educational Requirements

- Three required courses, equivalent of 9 semester credit hours

Examination Type

- Final course exam for each course; closed book, proctored

Continuing Education Requirements

- 15 hours of continuing education every two years

Business Background:

- Wealth Advisor – Sequoia Financial Group, LLC – July 2026 to Present
- Managing Director of Advisory Group – BSW Wealth Partners – August 2019 to Present
- Financial Advisor – BSW Wealth Partners – August 2019 to Present
- Private Wealth Advisor – Legacy Wealth Partners, LLC – January 2018 to August 2019
- Wealth Strategist and AVP – CoBiz Wealth – September 2013 to January 2018
- Wealth Plan Designer – CoBiz Wealth – January 2012 to September 2013
- Branch Controls Specialist and Contracting & Licensing Administrator – AXA Advisors, LLC – September 2008 to January 2012

Item 3 - Disciplinary Information

Registered Investment Advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice.

Tami Carroll has no disciplinary record that would impact a client's evaluation of the practice.

Item 4 - Other Business Activities

Tami Carroll is a Wealth Advisor with Sequoia Financial Group, LLC, the Parent Company and affiliated financial services firm of Sequoia Financial Advisors, LLC.

Item 5 - Additional Compensation

As a Wealth Advisor with Sequoia Financial Group, LLC, Tami Carroll receives a salary and is eligible to receive a bonus.

Item 6 - Supervision

Supervision and oversight of Tami Carroll is completed by Tom Neroni, or appropriate delegate. Sequoia conducts periodic reviews to ensure systems are in place to provide safeguards against inadvertent violation of laws, rules and regulations.

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Sequoia Financial Advisors, LLC's President, Annelise McCauley, and Tom Neroni, may be contacted by calling 1-888-225-3777.

Item 1- Cover Page

Brian Lichtenheld

Sequoia Financial Advisors, LLC

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Boulder, CO 80304

383 Inverness Pkwy Ste. 405
Englewood, CO 80112

1-888-225-3777
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July 2026

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Additional information about Brian Lichtenheld is available on the SEC's website at www.adviserinfo.sec.gov and FINRA's website at www.finra.org/brokercheck.

Item 2 - Educational Background and Business Experience

Brian Lichtenheld

Year of Birth:

- 1985

Education:

- B.S. in Business Administration – University of Colorado at Boulder, 2008

Examinations and Professional Designations:

- CERTIFIED FINANCIAL PLANNER™ practitioner (CFP®) – 2019

CFP®-CERTIFIED FINANCIAL PLANNER™

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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 Background:

- Wealth Advisor – Sequoia Financial Group, LLC – July 2026 to Present
- Financial Advisor, Associate Advisor and Values-Aligned Specialist – BSW Wealth Partners – January 2018 to Present
- Senior Portfolio Accountant – Crestone Capital – July 2008 to January 2018

Item 3 - Disciplinary Information

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Brian Lichtenheld has no disciplinary record that would impact a client's evaluation of the practice.

Item 4 - Other Business Activities

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Item 5 - Additional Compensation

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Item 1- Cover Page

Julie Martinez

Sequoia Financial Advisors, LLC

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Englewood, CO 80112

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July 2026

This Brochure Supplement provides information about Julie Martinez that supplements the Sequoia Financial Advisors, LLC Form ADV Part 2A Brochure. You should have received a copy of the Form ADV Part 2A Brochure. Please contact Julie Martinez at our office at (888) 225-3777 if you did not receive Sequoia Financial Advisor's Form ADV Part 2A Brochure or if you have any questions about the contents of this supplement.

Additional information about Julie Martinez is available on the SEC's website at www.adviserinfo.sec.gov and FINRA's website at www.finra.org/brokercheck.

Item 2 - Educational Background and Business Experience

Julie Martinez

Year of Birth:

- 1970

Education:

- B.S. – Colorado State University, 1992

Examinations and Professional Designations:

- CERTIFIED FINANCIAL PLANNER™ practitioner (CFP®) – 2006

CFP®-CERTIFIED FINANCIAL PLANNER™

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- **Examination** – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual's ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.
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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 Background:

- Wealth Advisor – Sequoia Financial Group, LLC – July 2026 to Present
- Shareholder – BSW Wealth Partners – January 2018 to Present
- Financial Advisor – BSW Wealth Partners – June 2015 to Present
- Managing Director of Advisory Group – BSW Wealth Partners – January 2018 to December 2024
- Financial Planner – Purple Wealth FKA KT Investment Advisors – September 2008 to June 2015
- Registered Representative – LPL Financial – February 2012 to June 2015
- Wealth Management Specialist – Wells Fargo Wealth Management Group – June 2006 to September 2008
- Commercial Real Estate Manager/Financial Planning Associate – Kahler Financial Group – July 1997 to June 2006

Item 3 - Disciplinary Information

Registered Investment Advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice.

Julie Martinez has no disciplinary record that would impact a client's evaluation of the practice.

Item 4 - Other Business Activities

Julie Martinez is a Wealth Advisor with Sequoia Financial Group, LLC, the Parent Company and affiliated financial services firm of Sequoia Financial Advisors, LLC.

Item 5 - Additional Compensation

As a Wealth Advisor with Sequoia Financial Group, LLC, Julie Martinez receives a salary and is eligible to receive a bonus.

Item 6 - Supervision

Supervision and oversight of Julie Martinez is completed by Tom Neroni, or appropriate delegate. Sequoia conducts periodic reviews to ensure systems are in place to provide safeguards against inadvertent violation of laws, rules and regulations.

Julie Martinez is an Investment Advisor Representative with Sequoia Financial Advisors, LLC. Sequoia Financial Advisors, LLC's President provides oversight of the team responsible for the investment and portfolio management process, in addition to the financial planning process of Sequoia Financial Advisors, LLC. Sequoia Financial Advisors, LLC's Investment Committee establishes the firm's general investment policy and strategy, plus sets guidelines on the overall products and services that are provided to advisory clients. The firm's Investment Committee accepts and implements investment strategies.

Sequoia Financial Advisors, LLC's President, Annelise McCauley, and Tom Neroni, may be contacted by calling 1-888-225-3777.

Item 1- Cover Page

Olivia O'Toole

Sequoia Financial Advisors, LLC

2300 Broadway Street
Boulder, CO 80304

383 Inverness Pkwy Ste. 405
Englewood, CO 80112

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www.sequoia-financial.com

July 2026

This Brochure Supplement provides information about Olivia O'Toole that supplements the Sequoia Financial Advisors, LLC Form ADV Part 2A Brochure. You should have received a copy of the Form ADV Part 2A Brochure. Please contact Olivia O'Toole at our office at (888) 225-3777 if you did not receive Sequoia Financial Advisor's Form ADV Part 2A Brochure or if you have any questions about the contents of this supplement.

Additional information about Olivia O'Toole is available on the SEC's website at www.adviserinfo.sec.gov and FINRA's website at www.finra.org/brokercheck.

Item 2 - Educational Background and Business Experience

Olivia O'Toole

Year of Birth:

- 1995

Education:

- Masters in Finance – University of Colorado at Boulder, 2018
- B.A. – University of Colorado at Boulder, 2017
- Series 65 securities license

Business Background:

- Portfolio Manager – Sequoia Financial Group, LLC – July 2026 to Present
- Portfolio Manager – BSW Wealth Partners – July 2020 to Present
- Director of Fixed Income – BSW Wealth Partners – 2024 to Present
- Reporting Specialist – BSW Wealth Partners – July 2018 to July 2020
- Intern – BSW Wealth Partners – April 2018 to July 2018

Item 3 - Disciplinary Information

Registered Investment Advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice.

Olivia O'Toole has no disciplinary record that would impact a client's evaluation of the practice.

Item 4 - Other Business Activities

Olivia O'Toole is a Portfolio Manager with Sequoia Financial Group, LLC, the Parent Company and affiliated financial services firm of Sequoia Financial Advisors, LLC.

Item 5 - Additional Compensation

As a Portfolio Manager with Sequoia Financial Group, LLC, Olivia O'Toole receives a salary and is eligible to receive a bonus.

Item 6 - Supervision

Supervision and oversight of Olivia O'Toole is completed by Tom Neroni, or appropriate delegate. Sequoia conducts periodic reviews to ensure systems are in place to provide safeguards against inadvertent violation of laws, rules and regulations.

Olivia O'Toole is an Investment Advisor Representative with Sequoia Financial Advisors, LLC. Sequoia Financial Advisors, LLC's President provides oversight of the team responsible for the investment and portfolio management process, in addition to the financial planning process of Sequoia Financial Advisors, LLC. Sequoia Financial Advisors, LLC's Investment Committee establishes the firm's general investment policy and strategy, plus sets guidelines on the overall products and services that are provided to advisory clients. The firm's Investment Committee accepts and implements investment strategies.

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Item 1- Cover Page

Raliegh D. Riddoch

Sequoia Financial Advisors, LLC

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July 2026

This Brochure Supplement provides information about Raliegh D. Riddoch that supplements the Sequoia Financial Advisors, LLC Form ADV Part 2A Brochure. You should have received a copy of the Form ADV Part 2A Brochure. Please contact Raliegh D. Riddoch at our office at (888) 225-3777 if you did not receive Sequoia Financial Advisor's Form ADV Part 2A Brochure or if you have any questions about the contents of this supplement.

Additional information about Raliegh D. Riddoch is available on the SEC's website at www.adviserinfo.sec.gov and FINRA's website at www.finra.org/brokercheck.

Item 2 - Educational Background and Business Experience

Raliegh D. Riddoch

Year of Birth:

- 1973

Education:

- B.S. in Finance – University of Northern Colorado, 1997

Examinations and Professional Designations:

- Certified Divorce Financial Analysts® (CDFA™) – 2012
- CERTIFIED FINANCIAL PLANNER™ practitioner (CFP®) – 2007

CDFA™ – CERTIFIED DIVORCE FINANCIAL ANALYST®

The Institute for Divorce Financial Analysts sponsors this program. A CDFA™ has a background in financial planning, accounting, or legal matters and completes a training program to become skilled at analyzing and providing expertise on the financial issues of divorce. The program consists of a comprehensive self-study course covering topics such as valuing and dividing property, retirement plans and pensions, tax problems and solutions, splitting the house, and financial implications of divorce settlement proposals.

Prerequisites/Experience Required:

- Bachelor's degree with three years of on-the-job experience; or
- no bachelor's degree, five years of relevant experience

Educational Requirements: Candidate must

- complete three exams and
- a comprehensive case study on the financial, tax, and legal issues of divorce

Examination Type: Proctored final exam
Continuing Education/Experience Requirements: 30 divorce-related hours every two year

CFP®-CERTIFIED FINANCIAL PLANNER™

I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER® professional or a CFP® professional, and I may use these and the other certification marks (the "CFP Board Certification Marks") that Certified Financial Planner Board of Standards Center for Financial Planning, Inc. has licensed to CFP Board in the United States. The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at www.cfp.net.

CFP® professionals have met CFP Board's high standards for education, examination, experience, and ethics. To become a CFP® professional, an individual must fulfill the following requirements:

- **Education** – Earn a bachelor's degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials. CFP Board implemented the bachelor's degree or higher requirement in 2007 and the financial planning development capstone course requirement in March 2012. Therefore, a CFP® professional who first became certified before those dates may not have earned a bachelor's or higher degree or completed a financial planning development capstone course.

- **Examination** – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual's ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.
- **Experience** – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.
- **Ethics** – Satisfy the Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement and agree to be bound by CFP Board's Code of Ethics and Standards of Conduct ("Code and Standards"), which sets forth the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements to remain certified and maintain the right to continue to use the CFP Board Certification Marks:

- **Ethics** – Commit to complying with CFP Board's Code and Standards. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.
- **Continuing Education** – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

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 Background:

- Wealth Advisor – Sequoia Financial Group, LLC – July 2026 to Present
- Financial Advisor/Shareholder – BSW Wealth Partners – January 2010 to Present
- Financial Advisor – BSW Wealth Partners – January 2010 to Dedcember 2013
- Financial Advisor and Planning Associate – Baydush Simon Weaver – July 2005 to December 2009

Item 3 - Disciplinary Information

Registered Investment Advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice.

Raliegh D. Riddoch has no disciplinary record that would impact a client's evaluation of the practice.

Item 4 - Other Business Activities

Raliegh D. Riddoch is a Wealth Advisor with Sequoia Financial Group, LLC, the Parent Company and affiliated financial services firm of Sequoia Financial Advisors, LLC.

Item 5 - Additional Compensation

As a Wealth Advisor with Sequoia Financial Group, LLC, Raliegh D. Riddoch receives a salary and is eligible to receive a bonus.

Item 6 - Supervision

Supervision and oversight of Raliegh D. Riddoch is completed by Tom Neroni, or appropriate delegate. Sequoia conducts periodic reviews to ensure systems are in place to provide safeguards against inadvertent violation of laws, rules and regulations.

Raliegh D. Riddoch is an Investment Advisor Representative with Sequoia Financial Advisors, LLC. Sequoia Financial Advisors, LLC's President provides oversight of the team responsible for the investment and portfolio management process, in addition to the financial planning process of Sequoia Financial Advisors, LLC. Sequoia Financial Advisors, LLC's Investment Committee establishes the firm's general investment policy and strategy, plus sets guidelines on the overall products and services that are provided to advisory clients. The firm's Investment Committee accepts and implements investment strategies.

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Item 1- Cover Page

Matthew Samek

Sequoia Financial Advisors, LLC

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July 2026

This Brochure Supplement provides information about Matthew Samek that supplements the Sequoia Financial Advisors, LLC Form ADV Part 2A Brochure. You should have received a copy of the Form ADV Part 2A Brochure. Please contact Matthew Samek at our office at (888) 225-3777 if you did not receive Sequoia Financial Advisor's Form ADV Part 2A Brochure or if you have any questions about the contents of this supplement.

Additional information about Matthew Samek is available on the SEC's website at www.adviserinfo.sec.gov and FINRA's website at www.finra.org/brokercheck.

Item 2 - Educational Background and Business Experience

Matthew Samek

Year of Birth:

- 1984

Education:

- B.A. – University of Colorado at Boulder, 2007
- Series 65 securities license

Business Background:

- Operations Manager – Sequoia Financial Group, LLC – July 2026 to Present
- Chief Operating Officer/Shareholder – BSW Wealth Partners – September 2018 to Present
- Managing Director of Operations/Shareholder – BSW Wealth Partners – January 2016 to Present
- Portfolio Manager – BSW Wealth Partners – February 2012 to December 2015
- Portfolio Mechanic – BSW Wealth Partners – January 2010 to February 2012
- Portfolio Mechanic – Baydush Simon Weaver – January 2008 to January 2010

Item 3 - Disciplinary Information

Registered Investment Advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice.

Matthew Samek has no disciplinary record that would impact a client's evaluation of the practice.

Item 4 - Other Business Activities

Matthew Samek is a Operations Manager with Sequoia Financial Group, LLC, the Parent Company and affiliated financial services firm of Sequoia Financial Advisors, LLC.

Item 5 - Additional Compensation

As a Operations Manager with Sequoia Financial Group, LLC, Matthew Samek receives a salary and is eligible to receive a bonus.

Item 6 - Supervision

Supervision and oversight of Matthew Samek is completed by Tom Neroni, or appropriate delegate. Sequoia conducts periodic reviews to ensure systems are in place to provide safeguards against inadvertent violation of laws, rules and regulations.

Matthew Samek is an Investment Advisor Representative with Sequoia Financial Advisors, LLC. Sequoia Financial Advisors, LLC's President provides oversight of the team responsible for the investment and portfolio management process, in addition to the financial planning process of Sequoia Financial Advisors, LLC. Sequoia Financial Advisors, LLC's Investment Committee establishes the firm's general investment policy and strategy, plus sets guidelines on the overall products and services that are provided to advisory clients. The firm's Investment Committee accepts and implements investment strategies.

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Item 1- Cover Page

Steven Szafranski

Sequoia Financial Advisors, LLC

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www.sequoia-financial.com

July 2026

This Brochure Supplement provides information about Steven Szafranski that supplements the Sequoia Financial Advisors, LLC Form ADV Part 2A Brochure. You should have received a copy of the Form ADV Part 2A Brochure. Please contact Steven Szafranski at our office at (888) 225-3777 if you did not receive Sequoia Financial Advisor's Form ADV Part 2A Brochure or if you have any questions about the contents of this supplement.

Additional information about Steven Szafranski is available on the SEC's website at www.adviserinfo.sec.gov and FINRA's website at www.finra.org/brokercheck.

Item 2 - Educational Background and Business Experience

Steven Szafranski

Year of Birth:

- 1988

Education:

- B.S. in Finance – University of Illinois at Urbana-Champaign, 2010

Examinations and Professional Designations:

- CERTIFIED FINANCIAL PLANNER™ practitioner (CFP®) – 2013

CFP®-CERTIFIED FINANCIAL PLANNER™

I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER® professional or a CFP® professional, and I may use these and the other certification marks (the "CFP Board Certification Marks") that Certified Financial Planner Board of Standards Center for Financial Planning, Inc. has licensed to CFP Board in the United States. The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at www.cfp.net.

CFP® professionals have met CFP Board's high standards for education, examination, experience, and ethics. To become a CFP® professional, an individual must fulfill the following requirements:

- **Education** – Earn a bachelor's degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials. CFP Board implemented the bachelor's degree or higher requirement in 2007 and the financial planning development capstone course requirement in March 2012. Therefore, a CFP® professional who first became certified before those dates may not have earned a bachelor's or higher degree or completed a financial planning development capstone course.
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- **Experience** – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.
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act in the best interests of the client, at all times when providing financial advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.

- **Continuing Education** – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

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 Background:

- Wealth Advisor – Sequoia Financial Group, LLC – July 2026 to Present
- Financial Planning Specialist – BSW Wealth Partners – June 2022 to Present
- Financial Planning/Associate Planner – Facet Wealth – July 2021 to May 2022
- Financial Advisor/Paraplanner – Ameriprise Financial – June 2008 to May 2013 and July 2014 to July 2021
- Financial Specialist – PNC Investments and PNC Bank – February 2014 to May 2014

Item 3 - Disciplinary Information

Registered Investment Advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice.

Steven Szafranski has no disciplinary record that would impact a client's evaluation of the practice.

Item 4 - Other Business Activities

Steven Szafranski is a Wealth Advisor with Sequoia Financial Group, LLC, the Parent Company and affiliated financial services firm of Sequoia Financial Advisors, LLC.

Item 5 - Additional Compensation

As a Wealth Advisor with Sequoia Financial Group, LLC, Steven Szafranski receives a salary and is eligible to receive a bonus.

Item 6 - Supervision

Supervision and oversight of Steven Szafranski is completed by Tom Neroni, or appropriate delegate. Sequoia conducts periodic reviews to ensure systems are in place to provide safeguards against inadvertent violation of laws, rules and regulations.

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Sequoia Financial Advisors, LLC's President, Annelise McCauley, and Tom Neroni, may be contacted by calling 1-888-225-3777.

Item 1- Cover Page

Benjamin R. Weaver

Sequoia Financial Advisors, LLC

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Englewood, CO 80112

1-888-225-3777

www.sequoia-financial.com

July 2026

This Brochure Supplement provides information about Benjamin R. Weaver that supplements the Sequoia Financial Advisors, LLC Form ADV Part 2A Brochure. You should have received a copy of the Form ADV Part 2A Brochure. Please contact Benjamin R. Weaver at our office at (888) 225-3777 if you did not receive Sequoia Financial Advisor's Form ADV Part 2A Brochure or if you have any questions about the contents of this supplement.

Additional information about Benjamin R. Weaver is available on the SEC's website at www.adviserinfo.sec.gov and FINRA's website at www.finra.org/brokercheck.

Item 2 - Educational Background and Business Experience

Benjamin R. Weaver

Year of Birth:

- 1970

Education:

- B.A. in Economics – University of Richmond, VA, 1993

Examinations and Professional Designations:

- CERTIFIED FINANCIAL PLANNER™ practitioner (CFP®) – 2001

CFP®-CERTIFIED FINANCIAL PLANNER™

I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER® professional or a CFP® professional, and I may use these and the other certification marks (the "CFP Board Certification Marks") that Certified Financial Planner Board of Standards Center for Financial Planning, Inc. has licensed to CFP Board in the United States. The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at www.cfp.net.

CFP® professionals have met CFP Board's high standards for education, examination, experience, and ethics. To become a CFP® professional, an individual must fulfill the following requirements:

- **Education** – Earn a bachelor's degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials. CFP Board implemented the bachelor's degree or higher requirement in 2007 and the financial planning development capstone course requirement in March 2012. Therefore, a CFP® professional who first became certified before those dates may not have earned a bachelor's or higher degree or completed a financial planning development capstone course.
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- **Experience** – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.
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- **Continuing Education** – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

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 Background:

- Wealth Advisor – Sequoia Financial Group, LLC – July 2026 to Present
- Financial Advisor/Shareholder – BSW Wealth Partners – January 2010 to Present
- Member/Investment Advisor Representative – R3 Returns, LLC – April 2012 to January 2015
- Financial Advisor/Shareholder/Managing Principal – Baydush Simon Weaver – January 2003 to December 2009

Item 3 - Disciplinary Information

Registered Investment Advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice.

Benjamin R. Weaver has no disciplinary record that would impact a client's evaluation of the practice.

Item 4 - Other Business Activities

Benjamin R. Weaver is a Wealth Advisor with Sequoia Financial Group, LLC, the Parent Company and affiliated financial services firm of Sequoia Financial Advisors, LLC.

Item 5 - Additional Compensation

As a Wealth Advisor with Sequoia Financial Group, LLC, Benjamin R. Weaver receives a salary and is eligible to receive a bonus.

Item 6 - Supervision

Supervision and oversight of Benjamin R. Weaver is completed by Tom Neroni, or appropriate delegate. Sequoia conducts periodic reviews to ensure systems are in place to provide safeguards against inadvertent violation of laws, rules and regulations.

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Item 1- Cover Page

Julia Wentworth

Sequoia Financial Advisors, LLC

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Englewood, CO 80112

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www.sequoia-financial.com

July 2026

This Brochure Supplement provides information about Julia Wentworth that supplements the Sequoia Financial Advisors, LLC Form ADV Part 2A Brochure. You should have received a copy of the Form ADV Part 2A Brochure. Please contact Julia Wentworth at our office at (888) 225-3777 if you did not receive Sequoia Financial Advisor's Form ADV Part 2A Brochure or if you have any questions about the contents of this supplement.

Additional information about Julia Wentworth is available on the SEC's website at www.adviserinfo.sec.gov and FINRA's website at www.finra.org/brokercheck.

Item 2 - Educational Background and Business Experience

Julia Wentworth

Year of Birth:

- 1984

Education:

- M.B.A. – Leeds School of Business, University of Colorado, 2017
- B.A. – University of Colorado, 2007
- Series 65 securities license

Examinations and Professional Designations:

- CERTIFIED FINANCIAL PLANNER™ practitioner (CFP®) – April 2020

CFP®-CERTIFIED FINANCIAL PLANNER™

I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER® professional or a CFP® professional, and I may use these and the other certification marks (the "CFP Board Certification Marks") that Certified Financial Planner Board of Standards Center for Financial Planning, Inc. has licensed to CFP Board in the United States. The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at www.cfp.net.

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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 Background:

- Wealth Advisor – Sequoia Financial Group, LLC – July 2026 to Present
- Financial Advisor, Associate Advisor – BSW Wealth Partners – April 2019 to Present
- Advisor, Associate Advisor, Operations Associate – Colorado Capital Management – April 2017 to March 2019
- Internship – Forester's Financial – January 2017 to April 2017
- Part-time Financial Planning Associate – Hinman Financial Planning, Inc. – September 2016 to March 2017
- Part-time Business Development Associate – WashPark Capital – December 2016 to February 2017
- Executive Assistant – Mental Health Partners – January 2015 to September 2016
- Executive Assistant – Boulder County Public Health – June 2013 to January 2015

Item 3 - Disciplinary Information

Registered Investment Advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice.

Julia Wentworth has no disciplinary record that would impact a client's evaluation of the practice.

Item 4 - Other Business Activities

Julia Wentworth is a Wealth Advisor with Sequoia Financial Group, LLC, the Parent Company and affiliated financial services firm of Sequoia Financial Advisors, LLC. Ms. Wentworth serves on the Investment Committee of the Community Foundation of Boulder County and does not receive compensation for this service.

Item 5 - Additional Compensation

As a Wealth Advisor with Sequoia Financial Group, LLC, Julia Wentworth receives a salary and is eligible to receive a bonus.

Item 6 - Supervision

Supervision and oversight of Julia Wentworth is completed by Tom Neroni, or appropriate delegate. Sequoia conducts periodic reviews to ensure systems are in place to provide safeguards against inadvertent violation of laws, rules and regulations.

Julia Wentworth is an Investment Advisor Representative with Sequoia Financial Advisors, LLC. Sequoia Financial Advisors, LLC’s President provides oversight of the team responsible for the investment and portfolio management process, in addition to the financial planning process of Sequoia Financial Advisors, LLC. Sequoia Financial Advisors, LLC’s Investment Committee establishes the firm’s general investment policy and strategy, plus sets guidelines on the overall products and services that are provided to advisory clients. The firm’s Investment Committee accepts and implements investment strategies.

Sequoia Financial Advisors, LLC’s President, Annelise McCauley, and Tom Neroni, may be contacted by calling 1-888-225-3777.

Item 1- Cover Page

Timothy Wojtalik

Sequoia Financial Advisors, LLC

2300 Broadway Street
Boulder, CO 80304

383 Inverness Pkwy Ste. 405
Englewood, CO 80112

1-888-225-3777

www.sequoia-financial.com

July 2026

This Brochure Supplement provides information about Timothy Wojtalik that supplements the Sequoia Financial Advisors, LLC Form ADV Part 2A Brochure. You should have received a copy of the Form ADV Part 2A Brochure. Please contact Timothy Wojtalik at our office at (888) 225-3777 if you did not receive Sequoia Financial Advisor's Form ADV Part 2A Brochure or if you have any questions about the contents of this supplement.

Additional information about Timothy Wojtalik is available on the SEC's website at www.adviserinfo.sec.gov and FINRA's website at www.finra.org/brokercheck.

Item 2 - Educational Background and Business Experience

Timothy Wojtalik

Year of Birth:

- 1969

Education:

- M.B.A. – University of Denver, 1997
- B.A. – University of Michigan, 1991

Examinations and Professional Designations:

- CERTIFIED FINANCIAL PLANNER™ practitioner (CFP®) – 2006

CFP®-CERTIFIED FINANCIAL PLANNER™

I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER® professional or a CFP® professional, and I may use these and the other certification marks (the "CFP Board Certification Marks") that Certified Financial Planner Board of Standards Center for Financial Planning, Inc. has licensed to CFP Board in the United States. The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at www.cfp.net.

CFP® professionals have met CFP Board's high standards for education, examination, experience, and ethics. To become a CFP® professional, an individual must fulfill the following requirements:

- **Education** – Earn a bachelor's degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials. CFP Board implemented the bachelor's degree or higher requirement in 2007 and the financial planning development capstone course requirement in March 2012. Therefore, a CFP® professional who first became certified before those dates may not have earned a bachelor's or higher degree or completed a financial planning development capstone course.
- **Examination** – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual's ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.
- **Experience** – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.
- **Ethics** – Satisfy the Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement and agree to be bound by CFP Board's Code of Ethics and Standards of Conduct ("Code and Standards"), which sets forth the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements to remain certified and maintain the right to continue to use the CFP Board Certification Marks:

- **Ethics** – Commit to complying with CFP Board's Code and Standards. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.
- **Continuing Education** – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

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 Background:

- Wealth Advisor – Sequoia Financial Group, LLC – July 2026 to Present
- Financial Advisor/Shareholder – BSW Wealth Partners – January 2010 to Present
- Financial Advisor and Planning Associate – Baydush Simon Weaver – April 2007 to December 2009
- Financial Advisor/Owner – Harvest Wealth Management – June 2006 to April 2007

Item 3 - Disciplinary Information

Registered Investment Advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice.

Timothy Wojtalik has no disciplinary record that would impact a client's evaluation of the practice.

Item 4 - Other Business Activities

Timothy Wojtalik is a Wealth Advisor with Sequoia Financial Group, LLC, the Parent Company and affiliated financial services firm of Sequoia Financial Advisors, LLC. He is also on the Board of Trustees and serves as the Chair of the Engagement Committee for Boulder Community Health Foundation.

Item 5 - Additional Compensation

As a Wealth Advisor with Sequoia Financial Group, LLC, Timothy Wojtalik receives a salary and is eligible to receive a bonus.

Item 6 - Supervision

Supervision and oversight of Timothy Wojtalik is completed by Tom Neroni, or appropriate delegate. Sequoia conducts periodic reviews to ensure systems are in place to provide safeguards against inadvertent violation of laws, rules and regulations.

Timothy Wojtalik is an Investment Advisor Representative with Sequoia Financial Advisors, LLC. Sequoia Financial Advisors, LLC's President provides oversight of the team responsible for the investment and portfolio management process, in addition to the financial planning process of Sequoia Financial Advisors, LLC. Sequoia Financial Advisors, LLC's Investment Committee establishes the firm's general investment policy and strategy, plus sets guidelines on the overall products and services that are provided to advisory clients. The firm's Investment Committee accepts and implements investment strategies.

Sequoia Financial Advisors, LLC's President, Annelise McCauley, and Tom Neroni, may be contacted by calling 1-888-225-3777.

Item 1- Cover Page

David C. Wolf

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July 2026

This Brochure Supplement provides information about David C. Wolf that supplements the Sequoia Financial Advisors, LLC Form ADV Part 2A Brochure. You should have received a copy of the Form ADV Part 2A Brochure. Please contact David C. Wolf at our office at (888) 225-3777 if you did not receive Sequoia Financial Advisor's Form ADV Part 2A Brochure or if you have any questions about the contents of this supplement.

Additional information about David C. Wolf is available on the SEC's website at www.adviserinfo.sec.gov and FINRA's website at www.finra.org/brokercheck.

Item 2 - Educational Background and Business Experience

David C. Wolf

Year of Birth:

- 1974

Education:

- J.D. – University of Colorado at Boulder, 2001
- M.B.A. – Leeds School of Business, University of Colorado at Boulder, 2001
- Visiting Student – St. Catherine's College, Oxford University, 1995
- B.A. – DePauw University, 1996
- Member, Colorado Bar Association
- Series 65 securities license

Business Background:

- Wealth Advisor – Sequoia Financial Group, LLC – July 2026 to Present
- Chief Executive Officer/Shareholder – BSW Wealth Partners – January 2020 to Present
- Managing Principal – BSW Wealth Partners – January 2010 to January 2020
- Managing Principal – R3 Returns, LLC – 2012 to March 2023
- Chief Operating Officer/Managing Principal – BSW Wealth Partners – January 2016 to September 2018
- Chief Investment Officer/Managing Principal – BSW Wealth Partners – January 2010 to December 2015
- Portfolio Manager/Principal – Baydush Simon Weaver – April 2002 to December 2009

Item 3 - Disciplinary Information

Registered Investment Advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice.

David C. Wolf has no disciplinary record that would impact a client's evaluation of the practice.

Item 4 - Other Business Activities

David C. Wolf is a Wealth Advisor with Sequoia Financial Group, LLC, the Parent Company and affiliated financial services firm of Sequoia Financial Advisors, LLC. Mr. Wolf serves on the Advisory Board for Renewal Funds and on the Advisory Board and limited partners advisory committee of Boulder Ventures. Mr. Wolf also serves on the Advisory Council of Ethic. Mr. Wolf is not compensated for his service on these advisory boards.

Item 5 - Additional Compensation

As a Wealth Advisor with Sequoia Financial Group, LLC, David C. Wolf receives a salary and is eligible to receive a bonus.

Item 6 - Supervision

Supervision and oversight of David C. Wolf is completed by Tom Neroni, or appropriate delegate. Sequoia conducts periodic reviews to ensure systems are in place to provide safeguards against inadvertent violation of laws, rules and regulations.

David C. Wolf is an Investment Advisor Representative with Sequoia Financial Advisors, LLC. Sequoia Financial Advisors, LLC's President provides oversight of the team responsible for the investment and portfolio management process, in addition to the financial planning process of Sequoia Financial Advisors, LLC. Sequoia Financial Advisors, LLC's Investment Committee establishes the firm's general investment policy and strategy, plus sets guidelines on the overall products and services that are provided to advisory clients. The firm's Investment Committee accepts and implements investment strategies.

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