

synergy™

ASSET MANAGEMENT, LLC

ITEM 1: COVER PAGE

PART 2B OF FORM ADV: BROCHURE SUPPLEMENT

Kevin J. Williams

Synergy Asset Management, LLC
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Bellevue, WA 98006
(206) 386-5455
www.synergy-am.com

2024

This brochure supplement provides information about Kevin Williams that supplements our ADV Part 2A brochure. You should have received a copy of that brochure. Please contact us via phone (206) 386-5455 or email info@synergy-am.com if you did not receive Synergy's brochure or if you have any questions about the content of this supplement.

Additional information about Kevin is available on the SEC's website at <http://www.adviserinfo.sec.gov>.

ITEM 2 EDUCATIONAL BACKGROUND AND EXPERIENCE

Kevin J. Williams, Senior Wealth Advisor and Relationship Manager

Year of Birth: 1966

Education:

- BA English/Minor Physics from Eastern Washington University

Business Experience:

- 2018 to current Synergy Asset Management, LLC
- 2018 to 2020 Gennaker Capital, LLC
- 04/2015 to 06/2018 Goldbloom Wealth Management, Bellevue, WA
- 01/2013 to 03/2015 Elite Wealth Management, Kirkland, WA
- 01/2008 to 01/2013 TD Ameritrade, Bellevue, WA

Item 3 Disciplinary Information

Synergy Asset Management, LLC is required to disclose all material facts regarding any legal or disciplinary events that would materially impact a client's evaluation of Kevin Williams. No events have occurred that are applicable to this item.

Item 4 Other Business Activities

Synergy Asset Management, LLC is required to disclose any outside business activities or occupation for compensation that could potentially create a conflict of interest with clients. Because Kevin receives commissions related to the sale of certain insurance products, this can create a conflict whereby a client will purchase insurance products through Synergy Financial Services. While Kevin will recommend such insurance products, a client is not obligated to purchase the recommended product through Kevin or Synergy.

Kevin also works with Synergy Mergers + Acquisitions, LLC as a real estate broker and may receive compensation for performing this service.

Item 5 Additional Compensation

In addition to compensation related to sales, client referrals and new accounts, Kevin may receive commissions and/or trail commissions related his activities as an insurance agent.

Item 6 Supervision

Todd Jessup, Chief Compliance Officer, is responsible for all supervision and monitoring of investment advice and insurance recommendations Kevin gives to clients. He can be reached at (206) 386-5455. While the underlying securities within accounts are continually monitored, Todd reviews these accounts at least quarterly. Accounts are reviewed in the context of each client's stated investment objectives and guidelines.