



ITEM 1: COVER PAGE

PART 2B OF FORM ADV: BROCHURE SUPPLEMENT

Jason Zalarick

**Synergy Asset Management, LLC
13231 SE 136th St, Suite 215
Bellevue, WA 98006
(206) 386-5455
www.synergy-am.com**

2024

This brochure supplement provides information about Jason Zalarick 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 Joe is available on the SEC's website at <http://www.adviserinfo.sec.gov>.

ITEM 2 EDUCATIONAL BACKGROUND AND EXPERIENCE

Jason Zalarick

Year of Birth: 1976

Education:

- Bachelor of Science – Marketing – Villanova University – 1998

Business Experience:

- 2020 to Present: Synergy Asset Management: Investment Advisor Rep/VP Advisor Services
- 2012-2020: Equity Advisor Solutions- Business Development Consultant
- 2011-2012: Fidelity Investments- Investment Advisor Rep
- 2009-2011: Advisors Asset Management- Investment Consultant
- 2008-2009: United Advisors- Senior VP
- 1999-2006: TD Ameritrade- Institutional Sales
- 1998-1999: American Express Financial Advisors- Financial Advisor

Industry License & Designations:

- Series 65 – 2020

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 Jason. 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. There are no outside business activities to disclose.

Item 5 Additional Compensation

Jason may receive additional compensation related to sales, client referrals, or new accounts in addition to his compensation paid through Synergy Asset Management, LLC.

Item 6 Supervision

Todd Jessup, Chief Compliance Officer, is responsible for all supervision and monitoring of investment advice and insurance recommendations Jason 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.