

# synergy™

## ASSET MANAGEMENT, LLC

**ITEM 1: COVER PAGE**

**PART 2B OF FORM ADV: BROCHURE SUPPLEMENT**

**Jason Zalarick**

**Synergy Asset Management, LLC  
13215 SE Mill Plain Blvd  
Suite C8-321  
Vancouver, WA 98684  
(206) 386-5455  
[www.synergy-am.com](http://www.synergy-am.com)**

**July 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](mailto: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.