

synergy™

ASSET MANAGEMENT, LLC

ITEM 1: COVER PAGE

PART 2B OF FORM ADV: BROCHURE SUPPLEMENT

Todd S. Jessup

**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 Todd S. Jessup 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

Todd S. Jessup

Year of Birth: 1971

Education:

- Bachelor of Arts – International Relations – Bucknell University 1994
- Bachelor of Science – Business Administration/Management – Bucknell University – 1994

Business Experience:

- 2023 to Present: President & CCO of Synergy Asset Management, LLC
- 2017 to 2023: COO & CCO of RVX Asset Management, LLC
- 2010 to 2016: Director of Marketing and Client Services of Vision Capital Management Inc.
- 2004 to 2010: Director of Marketing & Client Services of Rigel Capital, LLC
- 2001 to 2003: Vice President of Marketing for Clover Capital Management
- 1998 to 2000: Vice President of Marketing for Atlanta Capital Management
- 1994 to 1998: Senior Investment Officer for PNC Equity Advisors

Industry License & Designations:

- Chartered Financial Analyst - 2007

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 Todd. 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

Todd 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

While Todd Jessup is the Chief Compliance Officer, and responsible for all supervision and monitoring of investment advice and insurance recommendations IARs give to clients, his oversight comes from Synergy Founder and CIO Joe Maas. He can be reached at (206) 386-5455.