



# REALTA WEALTH

Realta Investment Advisors, Inc.

Johnny Borrelli

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**This Brochure Supplement provides information about Johnny Borrelli that supplements the Realta Investment Advisors, Inc. ("RIA")'s Brochure. You should have received a copy of that Brochure. Please contact Mr. Jacob Palmer at (888) 657-5200 if you have not received RIA's Brochure or if you have any questions about the contents of this supplement.**

**Additional information about Johnny Borrelli is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

## ITEM 2- EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Johnny Borrelli attended college at California State University, Northridge, where he received a Bachelor of Science degree in Urban and Environmental Planning. Upon graduation, Johnny worked as a Registered Representative for Centaurus Financial near Los Angeles, CA and then as an Agent and Financial Advisor with New York Life. He then transitioned over as a securitized real estate specialist in 2020, with his start with Concorde investment services, finally making his way over to Realta Wealth where he now works, alongside Matt Chancey with Tax Alpha Solutions, as a Tax Shelter and Private Equity Consultant. Johnny also previously worked as a Banker for US Bank in California from 2014 through 2017 and has also maintained his California Real estate license, which he has held since 2011.

## 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. There are no legal or disciplinary event(s) to disclose. Additional information about your Financial Advisor is available at [www.finra.org/brokercheck](http://www.finra.org/brokercheck) or [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## ITEM 4- OTHER BUSINESS ACTIVITIES

Johnny is licensed to sell securities through Realta Equities, Inc. ("REI"), a securities broker/dealer registered with the Financial Industry Regulatory Authority ("FINRA"). In this capacity, Johnny may be involved in the sale of investment products such as securities, mutual funds and variable products. If an advisory client implements recommendations made by Johnny by purchasing securities or other products through REI, Johnny will receive additional compensation in the form of commissions, including 12b-1 fees for the sale of such products. Johnny spends approximately 100% of his professional time in his sales capacities at REI.

Johnny is also a licensed insurance agent. Johnny may recommend insurance products to advisory clients. He is paid a commission for selling such products. He spends approximately 5% of his time in his capacity as an insurance agent. Johnny also happens to be the Chief Operating Officer for Access VA Benefits, Inc., where he oversees a team that assists veterans with their disability claims. He spends approximately 10% of his time during non-peak business hours in his capacity as COO.

## ITEM 5- ADDITIONAL COMPENSATION

Aside from the activities discussed in Item 4 above, Johnny receives no economic benefit from any non-client third party.

## ITEM 6- SUPERVISION

Mr. Jacob Palmer (Chief Compliance Officer) and designated supervisors monitor the investment advisory activities, personal investing activities, and adherence to the Advisor's compliance program and code of ethics on a continuous basis using various methods, including periodic inspection and review of client securities positions and transaction activity, obtaining certifications of compliance with company policies and procedures from those supervised, and obtaining and reviewing brokerage statements or transactions and holdings reports of the supervised persons. Mr. Palmer can be reached at 888-657-5200.