

**Form ADV Part 2B
(Brochure Supplements)**



SAGE MOUNTAIN

Item 1. Cover Page

Scott M. Neu



SAGE MOUNTAIN

945 East Paces Ferry Road NE, Suite 2660

Atlanta, GA 30326

(404) 795-8361

www.sagemountainadvisors.com

March 14, 2023

This Brochure Supplement provides information about Scott M. Neu that supplements the Sage Mountain Advisors, LLC (“Sage Mountain”) brochure. You should have received a copy of that Brochure. Please contact Sage Mountain’s Chief Compliance Officer if you did not receive Sage Mountain’s brochure or if you have any questions about the contents of this supplement. Additional information about Scott M. Neu is available on the SEC’s website at www.adviserinfo.sec.gov.

Item 2. Educational Background and Business Experience

Scott M. Neu, Chief Executive Officer

Year of Birth: 1970

Education:

Vanderbilt University, MBA, Business, 2000

University of Wyoming, BS, Electrical Engineering, 1998

Business Background:

Sage Mountain Advisors, LLC, Chief Executive Officer, September 2018 – Present

Goldman Sachs, Managing Director, August 2000 – August 2018

Mr. Neu holds the professional designation of Chartered Financial Analyst (“CFA”).

The CFA® charter is a credential awarded by the CFA Institute to individuals who meet its education, examination, sponsorship, experience and ethics requirements. To earn a CFA® charter, eligible candidates must have four years of qualified investment work experience, become a member of the CFA Institute, adhere to the Code of Ethics and Standards of Professional Conduct on an ongoing basis, and complete the CFA® program, which requires the passage of three separate six-hour examinations. Topics tested by the CFA Institute include ethical standards, quantitative methods, economics, financial reporting, corporate finance, equities, fixed income, derivatives, alternative investments, and portfolio management.

For additional information about this credential, please refer directly to the website of the issuing organization.

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. No information is applicable to Mr. Neu.

Item 4. Other Business Activities

Mr. Neu serves as Chief Investment Officer and President of the McMurry Foundation, a family foundation which supports communities within Wyoming in the areas of education, religion, children and advocacy for children, health and human services, the arts and humanities, and favorable business environments.

Mr. Neu serves as a Board Member and Professional Trustee for NERD Fiduciary Management, LLC. NERD is a private family trust company designed to provide fiduciary services to members of a family.

Item 5. Additional Compensation

No reportable additional compensation

Item 6. Supervision

Mr. Neu is the Chief Executive Officer of Sage Mountain and is generally responsible for his own supervision. Mr. Neu seeks to ensure that investments are suitable for his individual clients and consistent with their individual needs, goals, objectives and risk tolerance, as well as any restrictions requested by Sage Mountain clients.

Sage Mountain supervises its personnel and the investments made in client accounts. Sage Mountain monitors the investments recommended by Mr. Neu to ensure they are suitable for the particular client and consistent with their investment needs, goals, objectives and risk tolerance, as well as any restrictions previously requested by the client. Sage Mountain periodically reviews the advisory activities of Mr. Neu, which may include reviewing individual client accounts and correspondence (including e-mails) sent and received by Mr. Neu.

Item 1. Cover Page

Anthony J. Cox



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This Brochure Supplement provides information about Anthony J. Cox that supplements the Sage Mountain Advisors, LLC (“Sage Mountain”) brochure. You should have received a copy of that Brochure. Please contact Sage Mountain’s Chief Compliance Officer if you did not receive Sage Mountain’s brochure or if you have any questions about the contents of this supplement. Additional information about Anthony J. Cox is available on the SEC’s website at www.adviserinfo.sec.gov.

Item 2. Educational Background and Business Experience

Anthony J. Cox, Chief Investment Officer

Year of Birth: 1986

Education:

Vanderbilt University, Master of Science in Finance, Finance, 2009

University of Kentucky, Bachelor in Business Administration, Finance, 2007

Business Background:

Sage Mountain Advisors, LLC, Chief Investment Officer, September 2018 – Present

Goldman Sachs, Vice President, August 2009 – August 2018

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. No information is applicable to Mr. Cox.

Item 4. Other Business Activities

Mr. Cox serves as a member on the Synergy OZ Fund Advisory Board.

Item 5. Additional Compensation

No reportable additional compensation

Item 6. Supervision

Scott Neu, Chief Executive Officer, is generally responsible for supervising Mr. Cox's advisory activities on behalf of Sage Mountain. The telephone number to reach Scott Neu is (404) 795-8362. Sage Mountain supervises its personnel and the investments made in client accounts. Sage Mountain monitors the investments recommended by Mr. Cox to ensure they are suitable for the particular client and consistent with their investment needs, goals, objectives and risk tolerance, as well as any restrictions previously requested by the client. Sage Mountain periodically reviews the advisory activities of Mr. Cox, which may include reviewing individual client accounts and correspondence (including e-mails) sent and received by Mr. Cox.

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Christine Phelps



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This Brochure Supplement provides information about Christine Phelps that supplements the Sage Mountain Advisors, LLC (“Sage Mountain”) brochure. You should have received a copy of that Brochure. Please contact Sage Mountain’s Chief Compliance Officer if you did not receive Sage Mountain’s brochure or if you have any questions about the contents of this supplement. Additional information about Christine Phelps is available on the SEC’s website at www.adviserinfo.sec.gov.

Item 2- Educational Background and Business Experience

Year of Birth: 1978

Education:

Southern Methodist University, BBA, Finance and Real Estate; BA Latin American Studies, Minor Spanish, 2000

Professional Designations:

Emory University, Certified Financial Planner®, 2009

Business Background:

Sage Mountain Advisors, LLC, Partner and Wealth Advisor, May 2020 – Present

BB&T, Senior Vice President – Wealth Advisor, June 2013 – May 2020

Wells Fargo, Vice President – Senior Private Banker, June 2010 – May 2013

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. No information is applicable to Ms. Phelps.

Item 4. Other Business Activities

Sage Mountain is required to disclose information regarding any investment-related business or occupation in which Ms. Phelps is actively engaged. Sage Mountain has no information to disclose in relation to this Item.

Item 5. Additional Compensation

No reportable additional compensation

Item 6. Supervision

Scott Neu is generally responsible for supervising Ms. Phelps's advisory activities on behalf of Sage Mountain. The telephone number to reach Scott Neu is (404) 795-8361. Sage Mountain supervises its personnel and the investments made in client accounts. Sage Mountain monitors the investments recommended by Ms. Phelps to ensure they are suitable for the particular client and consistent with their investment needs, goals, objectives and risk tolerance, as well as any restrictions previously requested by the client. Sage Mountain periodically reviews the advisory activities of Ms. Phelps, which may include reviewing individual client accounts and correspondence (including e-mails) sent and received by Ms. Phelps.

Item 1- Cover Page

Edward “Ned” Douthat



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This Brochure Supplement provides information about Ned Douthat that supplements the Sage Mountain Advisors, LLC (“Sage Mountain”) brochure. You should have received a copy of that Brochure. Please contact Sage Mountain’s Chief Compliance Officer if you did not receive Sage Mountain’s brochure or if you have any questions about the contents of this supplement. Additional information about Ned Douthat is available on the SEC’s website at www.adviserinfo.sec.gov.

Item 2- Educational Background and Business Experience

Year of Birth: 1983

Education:

Emory University—Goizueta School of Business, MBA, 2015

University of Texas, Bachelors, 2006

Business Background:

Sage Mountain Advisors, LLC, Wealth Advisor, 2020 – Present

Goldman Sachs & Co. LLC, Private Wealth Advisor, 2015 – 2020

Russell Reynolds Associates, Research Consultant, 2010 – 2013

Ockham Research, LLC, Vice President, 2008 – 2010

Financial/Market Management, Inc., Vice President, 2006 – 2008

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. No information is applicable to Mr. Douthat.

Item 4. Other Business Activities

Sage Mountain is required to disclose information regarding any investment-related business or occupation in which Mr. Douthat is actively engaged. Sage Mountain has no information to disclose in relation to this Item.

Item 5. Additional Compensation

No reportable additional compensation

Item 6. Supervision

Scott Neu is generally responsible for supervising Mr. Douthat's advisory activities on behalf of Sage Mountain. The telephone number to reach Scott Neu is (404) 795-8362. Sage Mountain supervises its personnel and the investments made in client accounts. Sage Mountain monitors the investments recommended by Mr. Douthat to ensure they are suitable for the particular client and consistent with their investment needs, goals, objectives and risk tolerance, as well as any restrictions previously requested by the client. Sage Mountain periodically reviews the advisory activities of Mr. Douthat, which may include reviewing individual client accounts and correspondence (including e-mails) sent and received by Mr. Douthat.

Item 1. Cover Page

Will Tuggle, CFA



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This Brochure Supplement provides information about Will Tuggle that supplements the Sage Mountain Advisors, LLC (“Sage Mountain”) brochure. You should have received a copy of that Brochure. Please contact Sage Mountain’s Chief Compliance Officer if you did not receive Sage Mountain’s brochure or if you have any questions about the contents of this supplement. Additional information about Will Tuggle is available on the SEC’s website at www.adviserinfo.sec.gov.

Item 2. Educational Background and Business Experience

Will Tuggle, CFA, Wealth Advisor

Year of Birth: 1985

Education:

University of Georgia, Bachelor in Business Administration, Economics, 2007

Business Background:

Sage Mountain Advisors, LLC, Wealth Advisor, February 2022 – Present

Goldman Sachs & Co., Private Wealth Advisor, July 2008 – February 2022

Mr. Tuggle holds the professional designation of Chartered Financial Analyst (“CFA”).

The CFA® charter is a credential awarded by the CFA Institute to individuals who meet its education, examination, sponsorship, experience and ethics requirements. To earn a CFA® charter, eligible candidates must have four years of qualified investment work experience, become a member of the CFA Institute, adhere to the Code of Ethics and Standards of Professional Conduct on an ongoing basis, and complete the CFA® program, which requires the passage of three separate six-hour examinations. Topics tested by the CFA Institute include ethical standards, quantitative methods, economics, financial reporting, corporate finance, equities, fixed income, derivatives, alternative investments, and portfolio management.

For additional information about this credential, please refer directly to the website of the issuing organization.

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. No information is applicable to Mr. Tuggle.

Item 4. Other Business Activities

No reportable other business activities

Item 5. Additional Compensation

No reportable additional compensation

Item 6. Supervision

Scott Neu, Chief Executive Officer, is generally responsible for supervising Mr. Tuggle advisory activities on behalf of Sage Mountain. The telephone number to reach Scott Neu is

(404) 795-8362. Sage Mountain supervises its personnel and the investments made in client accounts. Sage Mountain monitors the investments recommended by Mr. Tuggle to ensure they are suitable for the particular client and consistent with their investment needs, goals, objectives and risk tolerance, as well as any restrictions previously requested by the client. Sage Mountain periodically reviews the advisory activities of Mr. Tuggle, which may include reviewing individual client accounts and correspondence (including e-mails) sent and received by Mr. Tuggle.

Item 1- Cover Page

John Russell “Russ” Allen, CFA



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This Brochure Supplement provides information about Russ Allen that supplements the Sage Mountain Advisors, LLC (“Sage Mountain”) brochure. You should have received a copy of that Brochure. Please contact Sage Mountain’s Chief Compliance Officer if you did not receive Sage Mountain’s brochure or if you have any questions about the contents of this supplement. Additional information about Russ Allen is available on the SEC’s website at www.adviserinfo.sec.gov.

Item 2- Educational Background and Business Experience

Year of Birth: 1975

Education:

University of California at San Diego, Master of Arts, Political Science, 2005

Johns Hopkins University, Master of Arts, International Relations, 2000

Wake Forest University, Bachelor of Arts, History 1997

Professional Designations:

Certified Financial Analyst®, 2004

Business Background:

Sage Mountain Advisors, LLC, Director of Investment Strategy, April 2020 – Present

Berman Capital Advisors, LLC, Chief Investment Officer, August 2014 – November 2020

Balentine LLC, Director of Investment Research, May 2013 – August 2014

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. No information is applicable to Mr. Allen.

Item 4. Other Business Activities

Sage Mountain is required to disclose information regarding any investment-related business or occupation in which Mr. Allen is actively engaged. Sage Mountain has no information to disclose in relation to this Item.

Item 5. Additional Compensation

No reportable additional compensation

Item 6. Supervision

Anthony Cox is generally responsible for supervising Mr. Allen's advisory activities on behalf of Sage Mountain. The telephone number to reach Anthony Cox is (404) 795-8361. Sage Mountain supervises its personnel and the investments made in client accounts. Sage Mountain monitors the investments recommended by Mr. Allen to ensure they are suitable for the particular client and consistent with their investment needs, goals, objectives and risk tolerance, as well as any restrictions previously requested by the client. Sage Mountain periodically reviews the advisory activities of Mr. Allen, which may include reviewing individual client accounts and correspondence (including e-mails) sent and received by Mr. Allen.

Item 1- Cover Page

Anna Esoda, CFA



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This Brochure Supplement provides information about Anna Esoda that supplements the Sage Mountain Advisors, LLC (“Sage Mountain”) brochure. You should have received a copy of that Brochure. Please contact Sage Mountain’s Chief Compliance Officer if you did not receive Sage Mountain’s brochure or if you have any questions about the contents of this supplement. Additional information about Anna Esoda is available on the SEC’s website at www.adviserinfo.sec.gov.

Item 2- Educational Background and Business Experience

Year of Birth: 1990

Education:

University of North Carolina at Chapel Hill

Bachelor of Science in Business Administration, Concentration in Investments, 2012

Business Background:

Sage Mountain Advisors, LLC, Senior Portfolio Manager, 02/2022 – Present

Signature FD, Portfolio Management Analyst / Senior Client Transition Manager 07/2012 – 02/2022

Ms. Esoda holds the professional designation of Chartered Financial Analyst (“CFA”).

The CFA® charter is a credential awarded by the CFA Institute to individuals who meet its education, examination, sponsorship, experience and ethics requirements. To earn a CFA® charter, eligible candidates must have four years of qualified investment work experience, become a member of the CFA Institute, adhere to the Code of Ethics and Standards of Professional Conduct on an ongoing basis, and complete the CFA® program, which requires the passage of three separate six-hour examinations. Topics tested by the CFA Institute include ethical standards, quantitative methods, economics, financial reporting, corporate finance, equities, fixed income, derivatives, alternative investments, and portfolio management.

For additional information about this credential, please refer directly to the website of the issuing organization.

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. No information is applicable to Ms. Esoda.

Item 4. Other Business Activities

Sage Mountain is required to disclose information regarding any investment-related business or occupation in which Ms. Esoda is actively engaged. Sage Mountain has no information to disclose in relation to this Item.

Item 5. Additional Compensation

No reportable additional compensation.

Item 6. Supervision

Scott Neu is generally responsible for supervising Ms. Esoda's advisory activities on behalf of Sage Mountain. The telephone number to reach Scott Neu is (404) 795-8361. Sage Mountain supervises its personnel and the investments made in client accounts. Sage Mountain monitors the investments recommended by Ms. Esoda to ensure they are suitable for the particular client and consistent with their investment needs, goals, objectives and risk tolerance, as well as any restrictions previously requested by the client. Sage Mountain periodically reviews the advisory activities of Ms. Esoda which may include reviewing individual client accounts and correspondence (including e-mails) sent and received by Ms. Esoda

Item 1- Cover Page

John Darby, CFA



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March 14, 2023

This Brochure Supplement provides information about John Darby that supplements the Sage Mountain Advisors, LLC (“Sage Mountain”) brochure. You should have received a copy of that Brochure. Please contact Sage Mountain’s Chief Compliance Officer if you did not receive Sage Mountain’s brochure or if you have any questions about the contents of this supplement. Additional information about John Darby is available on the SEC’s website at www.adviserinfo.sec.gov.

Item 2- Educational Background and Business Experience

Year of Birth: 1988

Education:

University of Alabama - Birmingham, Bachelor of Science, Marketing, 2010

Business Background:

Sage Mountain Advisors, LLC, Senior Portfolio Manager, 01/2023 – Present

CI Brightworth Private Wealth, Portfolio Manager, 10/2022 – 01/2023

Brightworth, Portfolio Manager, 11/2018 – 01/2023

Regions Bank, Investment Analyst, 06/2013-11/2018

Mr. Darby holds the professional designation of Chartered Financial Analyst (“CFA”).

The CFA® charter is a credential awarded by the CFA Institute to individuals who meet its education, examination, sponsorship, experience and ethics requirements. To earn a CFA® charter, eligible candidates must have four years of qualified investment work experience, become a member of the CFA Institute, adhere to the Code of Ethics and Standards of Professional Conduct on an ongoing basis, and complete the CFA® program, which requires the passage of three separate six-hour examinations. Topics tested by the CFA Institute include ethical standards, quantitative methods, economics, financial reporting, corporate finance, equities, fixed income, derivatives, alternative investments, and portfolio management.

For additional information about this credential, please refer directly to the website of the issuing organization.

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. No information is applicable to Mr. Darby.

Item 4. Other Business Activities

Sage Mountain is required to disclose information regarding any investment-related business or occupation in which Mr. Darby is actively engaged. Sage Mountain has no information to disclose in relation to this Item.

Item 5. Additional Compensation

No reportable additional compensation.

Item 6. Supervision

Anthony Cox is generally responsible for supervising Mr. Darby's advisory activities on behalf of Sage Mountain. The telephone number to reach Anthony Cox is (404) 795-8361. Sage Mountain supervises its personnel and the investments made in client accounts. Sage Mountain monitors the investments recommended by Mr. Darby to ensure they are suitable for the particular client and consistent with their investment needs, goals, objectives and risk tolerance, as well as any restrictions previously requested by the client. Sage Mountain periodically reviews the advisory activities of Mr. Darby, which may include reviewing individual client accounts and correspondence (including e-mails) sent and received by Mr. Darby.

Item 1- Cover Page

Allison Wagner



SAGE MOUNTAIN

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March 25, 2022

This Brochure Supplement provides information about Allison Wagner that supplements the Sage Mountain Advisors, LLC (“Sage Mountain”) brochure. You should have received a copy of that Brochure. Please contact Sage Mountain’s Chief Compliance Officer if you did not receive Sage Mountain’s brochure or if you have any questions about the contents of this supplement. Additional information about Allison Wagner is available on the SEC’s website at www.adviserinfo.sec.gov.

Item 2- Educational Background and Business Experience

Year of Birth: 1985

Education:

University of Florida, Bachelors, 2008

Business Background:

Sage Mountain Advisors, LLC, Vice President of Client Services, 2018 – Present

Goldman Sachs & Co. LLC, Wealth Management Professional, 2014 – 2018

PNC Investments, Relationship Manager, 2012 – 2014

Merrill Lynch, Financial Advisor, 2012 – 2012

SunTrust Bank, Financial Service Representative, 2010 – 2012

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. No information is applicable to Ms. Wagner.

Item 4. Other Business Activities

Sage Mountain is required to disclose information regarding any investment-related business or occupation in which Ms. Wagner is actively engaged. Sage Mountain has no information to disclose in relation to this Item.

Item 5. Additional Compensation

No reportable additional compensation

Item 6. Supervision

Whitney Imeraj is generally responsible for supervising Ms. Wagner's advisory activities on behalf of Sage Mountain. The telephone number to reach Whitney Imeraj is (404) 795-8364. Sage Mountain supervises its personnel and the investments made in client accounts. Sage Mountain monitors the investments recommended by Ms. Wagner to ensure they are suitable for the particular client and consistent with their investment needs, goals, objectives and risk tolerance, as well as any restrictions previously requested by the client. Sage Mountain periodically reviews the advisory activities of Ms. Wagner, which may include reviewing individual client accounts and correspondence (including e-mails) sent and received by Ms. Wagner.

Item 1- Cover Page

Alyzain Lakdawala



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March 14, 2023

This Brochure Supplement provides information about Alyzain Lakdawala that supplements the Sage Mountain Advisors, LLC (“Sage Mountain”) brochure. You should have received a copy of that Brochure. Please contact Sage Mountain’s Chief Compliance Officer if you did not receive Sage Mountain’s brochure or if you have any questions about the contents of this supplement. Additional information about Alyzain Lakdawala is available on the SEC’s website at www.adviserinfo.sec.gov.

Item 2- Educational Background and Business Experience

Year of Birth: 1997

Education:

University of Georgia - Athens, GA

Bachelor of Business Administration, Finance, 2019

Bachelor of Business Administration, Economics, 2020

Business Background:

Sage Mountain Advisors, LLC, Financial Analyst, 10/2019 – Present

Strategic Blueprint, LLC , Operations Analyst Intern, 05/2018 – 09/2019

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. No information is applicable to Mr. Lakdawala.

Item 4. Other Business Activities

Sage Mountain is required to disclose information regarding any investment-related business or occupation in which Mr. Lakdawala is actively engaged. Sage Mountain has no information to disclose in relation to this Item.

Item 5. Additional Compensation

No reportable additional compensation.

Item 6. Supervision

Anthony Cox is generally responsible for supervising Mr. Lakdawala's advisory activities on behalf of Sage Mountain. The telephone number to reach Anthony Cox is (404) 795-8361. Sage Mountain supervises its personnel and the investments made in client accounts. Sage Mountain monitors the investments recommended by Mr. Lakdawala to ensure they are suitable for the particular client and consistent with their investment needs, goals, objectives and risk tolerance, as well as any restrictions previously requested by the client. Sage Mountain periodically reviews the advisory activities of Mr. Lakdawala which may include reviewing individual client accounts and correspondence (including e-mails) sent and received by Mr. Lakdawala.

Ryan Sheffield



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This Brochure Supplement provides information about Ryan Sheffield that supplements the Sage Mountain Advisors, LLC (“Sage Mountain”) brochure. You should have received a copy of that Brochure. Please contact Sage Mountain’s Chief Compliance Officer if you did not receive Sage Mountain’s brochure or if you have any questions about the contents of this supplement. Additional information about Ryan Sheffield is available on the SEC’s website at www.adviserinfo.sec.gov.

Item 2- Educational Background and Business Experience

Year of Birth: 2000

Education:

The Ohio State University, Bachelors, 2022

Business Background:

Sage Mountain Advisors, LLC, Financial Analyst, 07/2022 – Present

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. No information is applicable to Mr. Sheffield.

Item 4. Other Business Activities

Sage Mountain is required to disclose information regarding any investment-related business or occupation in which Mr. Sheffield is actively engaged. Sage Mountain has no information to disclose in relation to this Item.

Item 5. Additional Compensation

No reportable additional compensation.

Item 6. Supervision

Anthony Cox is generally responsible for supervising Mr. Sheffield's advisory activities on behalf of Sage Mountain. The telephone number to reach Anthony Cox is (404) 795-8361. Sage Mountain supervises its personnel and the investments made in client accounts. Sage Mountain monitors the investments recommended by Mr. Sheffield to ensure they are suitable for the particular client and consistent with their investment needs, goals, objectives and risk tolerance, as well as any restrictions previously requested by the client. Sage Mountain periodically reviews the advisory activities of Mr. Sheffield, which may include reviewing individual client accounts and correspondence (including e-mails) sent and received by Mr. Sheffield.