

Item 1 Cover Page

David A. Savage
CRD #2443187

Savage And Company Wealth Management, LLC

Brochure Supplement
Dated March 2022

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This brochure supplement provides information about David A. Savage that supplements the Savage And Company Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact David Savage, Chief Compliance Officer if you did *not* receive Savage And Company Wealth Management, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about our firm is available on the SEC's website at www.adviserinfo.sec.gov by searching CRD #168090.

Item 2 Education Background and Business Experience

David A. Savage was born in 1957. Mr. Savage graduated from the University of Oregon in 1981, with a Bachelor of Arts degree in History from the Honors College. In 1993 he received a Masters in Teacher Education from Eastern Oregon State University.

Mr. Savage began his financial advising career in 1994, when he joined American Express Financial Advisers in Bend, Oregon. Mr. Savage worked there until May of 1999.

From 1999 to 2003, he provided financial planning and investment advice to clients as a Financial Adviser for Morgan Stanley (Dean Witter Reynolds, Inc.) in Bend, Oregon. During this time he designed and taught retirement and estate planning workshops at Central Oregon Community College.

From 2003 to 2011, Mr. Savage acted as a financial planner and Principal of Capstone Wealth Management Group in Bend, Oregon, an independent registered investment adviser firm.

From 2011 to 2013, he was a financial planner and investment adviser with Vari Investor Services in La Jolla, California, an independent registered investment adviser firm.

In October, 2013, Mr. Savage founded Savage And Company Wealth Management, LLC.

Mr. Savage became a Certified Financial Planner Professional (CFP®) in 2001.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- Education – Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board’s studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a Bachelor’s Degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP Board’s financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;
- Examination – Pass the comprehensive CFP® Certification Examination. The examination, administered in 10 hours over a two-day period, includes case studies and client scenarios designed to test one’s ability to correctly diagnose financial planning issues and apply one’s knowledge of financial planning to real world circumstances;
- Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
- Ethics—Agree to be bound by the CFP Board’s *Standards of Professional Conduct*, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- Continuing Education – Complete 30 hours of continuing education hours every two years, including two hours on the *Code of Ethics* and other parts of the *Standards of Professional Conduct*, to maintain competence and keep up with developments in the financial planning field; and

- Ethics—Renew an agreement to be bound by the *Standards of Professional Conduct*. The Standards prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

Item 3 Disciplinary Information¹

There are no legal or disciplinary events material to the evaluation of David A. Savage.

Item 4 Other Business Activities

David A. Savage does not engage in any business activities which would be deemed to create a material conflict of interest or require a substantial amount of time away from his duties as a financial planner and investment advisor.

Item 5 Additional Compensation

David A. Savage has no arrangements with clients or vendors which provide additional compensation with regard to his financial planning and investment advisory practice.

Item 6 Supervision

Savage And Company provides investment advisory and supervisory services in accordance with current state regulatory requirements. The Firm's Chief Compliance Officer, David Savage, is primarily responsible for overseeing the activities of the Firm's supervised persons. Mr. Savage also monitors accounts and conducts account reviews on at least an annual basis. Should a client have any questions regarding Savage And Company's supervision or compliance practices, please contact Mr. Savage at (541) 708-6763 or at david@savageandcompany.com.

Item 7 State-Registered Investment Advisors

David A. Savage has not been involved in any arbitration claim alleging damages in excess of \$2,500. Furthermore, he has neither been involved in nor found liable in any civil, self-regulatory organization, or administrative proceeding nor has been the subject of any bankruptcy petitions.

¹ ¹ Note: Our firm may, under certain circumstances, rebut the presumption that a disciplinary event is material. If an event is immaterial, we are not required to disclose it. When we review a legal or disciplinary event involving the advisor to determine whether it is appropriate to rebut the presumption of materiality, we consider all of the following factors: (1) the proximity of advisor to the advisory function; (2) the nature of the infraction that led to the disciplinary event; (3) the severity of the disciplinary sanction; and (4) the time elapsed since the date of the disciplinary event. If we conclude that the materiality presumption has been overcome, we prepare and maintain a file memorandum of our determination in our records. We follow SEC rule 204-2(a)(14)(iii) and similar state rules.