

SUPERVISED PERSON BROCHURE
FORM ADV PART 2B

Martial Frindethie, AAMS®, CCPS®

GenEra Wealth, LLC

Office Address:

764 Boulder Peak Avenue
Erie, CO 80516

Tel: (970) 907-3200

Email: martial@generawealthllc.com

Website: www.generawealthllc.com

September 30, 2026

This brochure supplement provides information about Martial Frindethie and supplements the GenEra Wealth, LLC brochure. You should have received a copy of that brochure. Please contact Martial Frindethie if you did not receive the brochure or if you have any questions about the contents of this supplement.

**ADDITIONAL INFORMATION ABOUT MARTIAL FRINETHE (CRD #6012617) IS
AVAILABLE ON THE SEC'S WEBSITE AT WWW.ADVISERINFO.SEC.GOV.**

Brochure Supplement (Part 2B of Form ADV)

Supervised Person Brochure

Principal Executive Officer – Martial Frindethie, AAMS®, CCPS®

- Year of birth: 1991
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Item 2 - Educational Background and Business Experience

Educational Background:

- University of Colorado - Boulder; Area of Focus – Environmental Engineering; Attended 2009-2012

Business Experience:

- GenEra Wealth, LLC.; CCO/Investment Advisor Representative; 08/2026-Present
- Leontine Holdings, Inc.; Owner; 06/2026-Present
- GenEra Wealth, LLC.; Co-CEO; 06/2026-Present
- The Millstone Evans Group, LLC; COO/Investment Advisor Representative; 01/2025-05/2026
- The Millstone Evans Group, LLC; Director of Operations/Investment Advisor Representative; 01/2021-12/2024
- The Millstone Evans Group of Raymond James; Sr. Client Relationship Coordinator; 12/2011-12/2020

Professional Certifications

Martial Frindethie has earned certifications and credentials that are required to be explained in further detail.

Accredited Asset Management SpecialistSM (AAMS®) Accredited Asset Management Specialist is a designation granted by the College of Financial Planning. AAMS® requirements:

- Individuals who hold the AAMS® designation have completed a course of study encompassing investments, insurance, tax, retirement, and estate planning issues. Additionally, individuals must pass an end-of-course examination that tests their ability to synthesize complex concepts and apply theoretical concepts to real-life situations.
- All designees have agreed to adhere to Standards of Professional Conduct and are subject to a disciplinary process.
- Designees renew their designation every two-years by completing 16 hours of continuing education, reaffirming adherence to the Standards of Professional Conduct and complying with self-disclosure requirements.

The Certified College Planning Specialist (CCPS®): certification and designation is granted by the National Institute of Certified College Planners (NICCP). CCPS® requirements:

- There are no pre-qualification requirements needed to enter the CCPS® certification program.
- Successful completion of three online exams.
- When you achieve the CCPS® designation, you must earn 24 hours of continuing education each year to maintain the designation in good standing.

Item 3 - Disciplinary Information

- A. Mr. Frindethie has not been involved in any criminal or civil action.
- B. Mr. Frindethie has never been involved in any administrative enforcement proceedings .
- C. Mr. Frindethie has never been involved in any self-regulatory organization (SRO) proceedings.
- D. Mr. Frindethie has not been involved in any other hearing or formal adjudication in which a professional attainment, designation, or license of the supervised person was revoked or suspended because of a violation of rules relating to professional conduct.

Item 4 - Other Business Activities

Martial Frindethie is the owner of Leontine Holdings, Inc. He spends approximately 5% of his time on this activity. This is not a conflict of interest as there will be no crossover clients.

Item 5 - Additional Compensation

Mr. Frindethie does not receive any performance-based fees and does not receive any additional compensation for performing advisory services other than what is disclosed in Item 5 of Part 2A.

Item 6 - Supervision

Mr. Frindethie is the Chief Compliance Officer of GenEra Wealth and is responsible for all supervision. He will adhere to the rules, codes, code of ethics and the firm's policies and procedures as described in the firm's Compliance Manual. Mr. Frindethie's trades will be reviewed by Jarrett Sharp. Mr. Frindethie can be reached at martial@generawealthllc.com or (970) 907-3200.

Item 7 - Requirements for State-Registered Advisors

- A. Mr. Frindethie has never been involved in any arbitration or disciplinary action.
- B. Mr. Frindethie has never been the subject of a bankruptcy petition.

SUPERVISED PERSON BROCHURE
FORM ADV PART 2B

Jarrett Sharp

GenEra Wealth, LLC

Office Address:

764 Boulder Peak Avenue
Erie, CO 80516

Tel: (970) 907-3201

Email: jarrett@generawealthllc.com

Website: www.generawealthllc.com

September 30, 2026

This brochure supplement provides information about Jarrett Sharp and supplements the GenEra Wealth, LLC brochure. You should have received a copy of that brochure. Please contact Jarrett Sharp if you did not receive the brochure or if you have any questions about the contents of this supplement.

ADDITIONAL INFORMATION ABOUT JARRETT SHARP (CRD #7187369) IS AVAILABLE ON THE SEC'S WEBSITE AT WWW.ADVISERINFO.SEC.GOV.

Brochure Supplement (Part 2B of Form ADV)

Supervised Person Brochure

Principal Executive Officer – Jarrett Sharp

- Year of birth: 1999
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Item 2 - Educational Background and Business Experience

Educational Background:

- University of Southern California; MBA; 2025
- University of Colorado – Boulder; B.S.B.A Personal Financial Planning; 2020

Business Experience:

- GenEra Wealth, LLC.; Investment Advisor Representative; 08/2026-Present
 - GenEra Wealth, LLC.; Co-CEO; 06/2026-Present
 - TrueInsights CFO, LLC; Lead Fractional CFO; 01/2026-Present
 - Sharper Image Tax Services, LLC; Lead Tax Preparer; 01/2026-Present
 - Sharper Image Holdings, Inc.; Founder & CEO; 01/2026-Present
 - Sharper Image Financial Services, LLC.; Managing Member/Chief Compliance Officer/Investment Advisor Representative; 02/2024-Present
 - Student; 08/2023-05/2025
 - The Millstone Evans Group, LLC; Chief Financial Officer/Financial Planning Associate; 01/2022-07/2023
 - The Millstone Evans Group, LLC; Investment Advisor Representative; 03/2021-07/2023
 - The Millstone Evans Group, LLC; Operations Specialist; 01/2021-07/2023
 - The Millstone Evans Group of Raymond James; Intern; 10/2019-12/2020
 - Brookfield Residential; Finance/Accounting Intern; 05/2019-08/2019
 - Entertainment Partners; Payroll Tax Analyst; 06/2018-08/2018
 - Full Time Student; 02/2015-12/2020
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Item 3 - Disciplinary Information

- Mr. Sharp has not been involved in any criminal or civil action.
 - Mr. Sharp has never been involved in any administrative enforcement proceedings.
 - Mr. Sharp has never been involved in any self-regulatory organization (SRO) proceedings.
 - Mr. Sharp has not been involved in any other hearing or formal adjudication in which a professional attainment, designation, or license of the supervised person was revoked or suspended because of a violation of rules relating to professional conduct.
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Item 4 - Other Business Activities

Jarrett Sharp has a financial affiliated business as an investment advisor representative with Sharper Image Financial Services, LLC. Approximately 33% of his time is spent on this activity. Jarrett Sharp also offers CFO services to clients through TrueInsights CFO, LLC. These services are separate and distinct from advisory services. Approximately 20% of

Jarrett's time is spent in this practice. Jarrett Sharp is also a tax preparer with Sharper Image Tax Services, LLC, approximately 9% of Jarrett's time is spent in this business. From time to time, he will offer clients services from those activities.

These practices represent conflicts of interest because it gives an incentive to recommend products or services based on the commission or fee amount received. This conflict is mitigated by disclosures, procedures and the firm's fiduciary obligation to place the best interest of the Client first and the Clients are not required to purchase any products or services. Clients have the option to purchase these products or services through another investment advisor representative, tax preparer or CFO of their choosing.

Jarrett Sharp is the owner of Sharper Image Holdings, Inc. He spends approximately 5% of his time on this activity. This is not a conflict of interest as there will be no crossover clients.

Item 5 - Additional Compensation

Mr. Sharp does not receive any performance-based fees and does not receive any additional compensation for performing advisory services other than what is disclosed in Item 5 of Part 2A.

Item 6 - Supervision

Martial Frindethie is the Chief Compliance Officer of GenEra Wealth. Martial Frindethie reviews Jarrett Sharp's work through Client account reviews and quarterly personal transaction reports, as well as face-to-face and phone interactions. He can be reached at martial@generawealthllc.com or (970) 907-3200.

Item 7 - Requirements for State-Registered Advisors

- A. Mr. Sharp has never been involved in any arbitration or disciplinary action.
- B. Mr. Sharp has never been the subject of a bankruptcy petition.

SUPERVISED PERSON BROCHURE
FORM ADV PART 2B

Emmett Christopher Fehlau-Barton, CFP®

GenEra Wealth, LLC

Office Address:

764 Boulder Peak Avenue
Erie, CO 80516

Tel: (720) 530-5687

Email: emmett@generawealthllc.com

Website: www.generawealthllc.com

September 30, 2026

This brochure supplement provides information about Emmett Christopher Fehlau-Barton and supplements the GenEra Wealth, LLC brochure. You should have received a copy of that brochure. Please contact Emmett Christopher Fehlau-Barton if you did not receive the brochure or if you have any questions about the contents of this supplement.

ADDITIONAL INFORMATION ABOUT EMMETT CHRISTOPHER FEHLAU-BARTON (CRD #7902569) IS AVAILABLE ON THE SEC'S WEBSITE AT WWW.ADVISERINFO.SEC.GOV.

Brochure Supplement (Part 2B of Form ADV)

Supervised Person Brochure

Emmett Christopher Fehlau-Barton, CFP®

- Year of birth: 2001
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Item 2 - Educational Background and Business Experience

Educational Background:

- University of Colorado; Bachelor of Science in Business Administration - Finance; 2023

Business Experience:

- GenEra Wealth, LLC.; Investment Advisor Representative; 08/2026-Present
- TrueInsights CFO, LLC; Senior Support Staff; 01/2026-Present
- Sharper Image Tax Services, LLC; Tax Preparer; 01/2026-Present
- Sharper Image Holdings, Inc.; President, Operations; 01/2026-Present
- Foundation Financial Planning, LLC; Paraplanner; 10/2024-Present
- Sharper Image Financial Services, LLC.; Investment Advisor Representative; 05/2024-Present
- Full Time Student; 02/2015-02/2024
- The Millstone Evans Group, LLC; Intern; 09/2022-12/2023
- SM Energy; Intern; 05/2022-08/2022

Professional Certifications

Emmett Christopher Fehlau-Barton has earned certifications and credentials that are required to be explained in further detail.

CERTIFIED FINANCIAL PLANNER™ (CFP®)

I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and I may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold CFP® certification. You may find more information about CFP® certification at www.cfp.net.

CFP® professionals have met CFP Board's high standards for education, examination, experience, and ethics. To become a CFP® professional, an individual must fulfill the following requirements:

- **Education** – Earn a bachelor's degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials.

- **Examination** – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual's ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.
- **Experience** – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.
- **Ethics** – Satisfy the *Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement* and agree to be bound by CFP Board's *Code of Ethics and Standards of Conduct* ("Code and Standards"), which sets forth the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements to remain certified and maintain the right to continue to use the CFP Board Certification Marks:

- **Ethics** – Commit to complying with CFP Board's *Code and Standards*. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.
- **Continuing Education** – Complete 30 hours of continuing education hours every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the *Code and Standards*.

Item 3 - Disciplinary Information

- Mr. Fehlau-Barton has not been involved in any criminal or civil action.
- Mr. Fehlau-Barton has never been involved in any administrative enforcement proceedings.
- Mr. Fehlau-Barton has never been involved in any self-regulatory organization (SRO) proceedings.
- Mr. Fehlau-Barton has not been involved in any other hearing or formal adjudication in which a professional attainment, designation, or license of the supervised person was revoked or suspended because of a violation of rules relating to professional conduct.

Item 4 - Other Business Activities

Emmett Fehlau-Barton is an investment advisor representative with Sharper Image Financial Services, LLC. Approximately 37% of time will be spent on this activity. Mr. Fehlau-Barton also offers tax preparation services through Sharper Image Tax Services, LLC and CFO services to clients through TrueInsights CFO, LLC. These services are separate and distinct from advisory services. Approximately 1% of Emmett's time is spent in each of these practices. From time to time, he will offer clients services from those activities.

These practices represent conflicts of interest because they give an incentive to recommend services based on the fees received. This conflict is mitigated by disclosures, procedures, and the firm's Fiduciary obligation to place the best interest of the client first

and the clients are not required to purchase any services. Clients have the option to purchase these services through another investment advisor representative, tax preparer or company of their choosing.

Mr. Fehlau-Barton is a Paraplanner with Foundation Financial Planning, LLC. Approximately 40% of his time is spent on this activity. Finally, Mr. Fehlau-Barton is President, Operations of Sharper Image Holdings, Inc. He spends approximately 3% of his time on this activity. These are not conflicts of interest as there are no crossover clients.

Item 5 - Additional Compensation

Mr. Fehlau-Barton does not receive any performance-based fees and does not receive any additional compensation for performing advisory services other than what is disclosed in Item 5 of Part 2A.

Item 6 - Supervision

Jarrett Sharp reviews Emmett Christopher Fehlau-Barton's work through Client account reviews and quarterly personal transaction reports, as well as face-to-face and phone interactions. He can be reached at jarrett@generawealthllc.com or 970-907-3201.

Item 7 - Requirements for State-Registered Advisors

- A. Mr. Fehlau-Barton has never been involved in any arbitration or disciplinary action.
- B. Mr. Fehlau-Barton has never been the subject of a bankruptcy petition.