

Item 1 Cover Page

SUPERVISED PERSON BROCHURE
FORM ADV PART 2B

Joel William Reimers, CFA



SAGEWEALTH
— ADVISORY —

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

ADDITIONAL INFORMATION ABOUT JOEL WILLIAM REIMERS (CRD #1629406) IS AVAILABLE ON THE SEC'S WEBSITE AT WWW.ADVISERINFO.SEC.GOV.

Brochure Supplement (Part 2B of Form ADV)

Supervised Person Brochure

Joel William Reimers

- Year of birth: 1956

Item 2 - Educational Background and Business Experience

Educational Background:

- University of Minnesota; Master of Science Agricultural Economics, 1985

Professional Certifications

Joel William Reimers has earned certifications and credentials that are required to be explained in further detail.

Chartered Financial Analyst (CFA): Chartered Financial Analysts designation is awarded by the CFA Institute. CFA certification requirements:

- Hold a bachelor's degree from an accredited institution or have equivalent educational or work experience.
- Successful completion of all three exam levels of the CFA Program.
- Have 48 months of acceptable professional work experience in the investment decision-making process.
- Fulfill society requirements, which vary by society. Unless you are upgrading from affiliate membership, all societies require two sponsor statements as part of each application; these are submitted online by your sponsors.
- Agree to adhere to and sign the Member's Agreement, a Professional Conduct Statement, and any additional documentation requested by CFA Institute.

Business Experience:

01/2023 - Present Senior Portfolio Strategist
Sage Wealth Advisory, LLC

12/2003 – 04/2022 CIO
Bremer Bank

Item 3 - Disciplinary Information

1. Joel William Reimers has never been involved in a criminal or civil action in a domestic, foreign or military court of competent jurisdiction for which he:
 - a. Was convicted of, or pled guilty or nolo contendere ("no contest") to (a) any felony; (b) misdemeanor that involved investments or an investment-related business, fraud, false statement or omissions, wrongful taking of property, bribery, perjury, counterfeiting, or extortion; or (c) a conspiracy to commit any of these offenses;
 - b. Is the named subject of a pending criminal proceeding that involves an investment-related business, fraud, false statements or omissions, wrongful taking of property, bribery, perjury, forgery, counterfeiting, extortion, or a conspiracy to commit any of these offenses;

- c. Was found to have been involved in a violation of an investment-related statute or regulation; or
 - d. Was the subject of any order, judgement or decree permanently or temporarily enjoining, or otherwise limiting, him from engaging in any investment related activity, or from violating any investment-related statute, rule, or order.
2. Joel William Reimers never had an administrative proceeding before the SEC, any other federal regulatory agency, any state regulatory agency, or any foreign financial regulatory authority in which he:
 - a. Was found to have caused an investment-related business to lose its authorization to do business; or the subject of an order by the agency or authority;
 - b. Was found to have been involved in a violation of an investment-related statute or regulation or was the subject of an order by the agency or authority
 - (i) denying, suspending or revoking the authorization of the supervised person to act in an investment-related business; (ii) barring or suspending his association with an investment-related business; (iii) otherwise significantly limiting his investment-related activities; or (iv) imposing a civil money penalty of more than \$2,500 on him.
3. Joel William Reimers has never been the subject of a self-regulatory organization (SRO) proceeding in which he:
 - a. Was found to have caused an investment-related business to lose its authorization to do business; or
 - b. Was found to have been involved in a violation of the SRO's rules and was: (a) barred or suspended from membership or from association with other members, or was expelled from membership; (b) otherwise significantly limited from investment-related activities; or (c) fined more than \$2,500.
4. Joel William Reimers 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

Joel William Reimers is not engaged in any investment-related business or occupation (other than this advisory firm).

Item 5 - Additional Compensation

Joel William Reimers 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

As a representative of Sage Wealth Advisory, LLC, Joel William Reimers is supervised by Jeffrey C. Schultz, the firm's Chief Compliance Officer. Jeffrey C. Schultz is responsible for ensuring that Joel William Reimers adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Jeffrey C. Schultz is (320) 761-2214.

Item 7 - Requirements for State-Registered Advisors

1. Joel William Reimers has not been involved in any of the following:
 - a. An award or otherwise been found liable in an arbitration claim alleging damages in excess of \$2,500 involving any of the following:
 - i. An investment or an investment-related business or activity;
 - ii. Fraud, false statement(s) or omissions;
 - iii. Theft, embezzlement or other wrongful taking of property;
 - iv. Bribery, forgery, counterfeiting, or extortion;
 - v. Dishonest, unfair or unethical practices.
 - b. An award or otherwise been found liable in a civil, self-regulatory organization, or administrative proceeding involving any of the following:
 - i. An investment or an investment-related business or activity;
 - ii. Fraud, false statement(s) or omissions;
 - iii. Theft, embezzlement or other wrongful taking of property;
 - iv. Bribery, forgery, counterfeiting, or extortion;
 - v. Dishonest, unfair or unethical practices.
2. Joel William Reimers has never been the subject of a bankruptcy petition.