

Brochure Supplement

This brochure provides information about principals and adviser representatives of FormulaFolio Investments, LLC and this brochure supplements the FormulaFolio Investments, LLC brochure. You should have received a copy of that brochure. If you did not receive FormulaFolio Investments, LLC brochure or if you have any questions about the contents of this supplement. Please contact compliance at: **(888) 562-8880**, or compliance@formulafolios.com

The information in this brochure has not been approved or verified by the United States Securities and Exchange Commission or by any state securities authority. Additional information about FormulaFolio Investments, LLC is available on the SEC's website at www.adviserinfo.sec.gov. FormulaFolio Investments, LLC is an SEC registered investment adviser. Registration does not imply any level of skill or training.

Effective Date: 06/26/2019

89 Ionia Ave NW, Suite 600
Grand Rapids, MI 49503

Office **888-562-8880**
Fax **616-965-2328**

formulafolios.com
support@formulafolios.com

Item 2: Educational Background and Business Experience

Professional Certificates

Employees have earned certifications and credentials that are required to be explained in further detail.

Jason Wenk

Executive Director of Product Development / Strategic Consultant

Date of Birth: 1980

Educational Background: Grand Valley State University, 1998-1999

Business Experience:

- 09/2018 – Present, Altruist Corp, CEO / Shareholder
- 11/2011 - Present, FormulaFolio Investments, LLC, Executive Director of Product Development / Strategic Consultant / Managing Member
- 10/2005 - Present, Retirement Wealth Advisors, Shareholder
- 05/2004 - 12/2005, Geneos Wealth Management, Financial Advisor
- 09/2002 - 05/2004, Woodbury Financial Services, Financial Advisor
- 01/2002 - 09/2002, Foresters Equity Services, Financial Advisor
- 10/2000 - 12/2002, Morgan Stanley, Financial Advisor

Item 3 & 7: Disciplinary Information

As it relates to past, current or prospective clients, Jason Wenk has not been involved in any legal or disciplinary events, has not been involved in arbitrations, has not been subject to self-regulatory organization or administrative proceedings and has not filed or planning to file a bankruptcy petition.

Item 4: Other Business Activities

Mr. Wenk is a 50% silent partner in Kasia Insurance Agency, a commercial insurance brokerage firm in Chicago, IL. He does not actively work in this company nor does he hold any insurance licenses, his role is as an investor only. Altruist Corp/Affiliated entities hold a pending broker dealer registration.

Item 5: Additional Compensation

Jason Wenk does not receive any economic benefits from anyone who is not a client for providing advisory services.

Item 6: Supervision

Jason Wenk is supervised by Danielle Tyler, Chief Compliance Officer. She reviews Jason Wenk's work.

Danielle Tyler's contact information: Phone (888)-562-8880, ext. 1011 Email dtyler@formulafolios.com

Jason Crump

Managing Member / Chief Executive Officer

Date of Birth: 1977

Educational Background:

- Calvin College, BS 1999
- Securities licenses: Series 65 license (active)

Business Experience:

- 01/2014 - Present, FormulaFolio Investments, LLC., Managing Member, Chief Executive Officer (CEO)
- 09/2007 - Present, Retirement Wealth Advisors, Inc., Investment Advisor Representative, Chief Executive Officer (CEO)
- 10/2004 - 10/2007, Fifth Third Securities, Inc., Investment Advisor Representative
- 09/2003 - 10/2004, Bank One Securities Corp, Representative
- 06/2003 - 08/2003, Geneos Wealth Management, Investment Advisor Representative
- 11/2002 - 06/2003, Intersecurities, Inc. Registered Rep
- 11/2001 - 10/2002, Foresters Equity Services, Registered Rep Morgan Stanley, Financial Advisor

Item 3 & 7: Disciplinary Information

As it relates to past, current or prospective clients, Jason Crump has not been involved in any legal or disciplinary events, has not been involved in arbitrations, has not been subject to self-regulatory organization or administrative proceedings and has not filed or planning to file a bankruptcy petition.

Item 4: Other Business Activities

Jason Crump is a licensed insurance agent. He may offer insurance products and receive normal and customary fees as a result of insurance sales. A conflict of interest may arise as these insurance sales may create an incentive to recommend products based on the compensation adviser and/or our supervised persons may earn and may not necessarily be in the best interests of the client.

Item 5: Additional Compensation

Jason Crump does not receive any economic benefits from anyone who is not a client for providing advisory services.

Item 6: Supervision

Jason Crump is supervised by Danielle Tyler, Chief Compliance Officer. She reviews Jason Crump's work through frequent office interactions.

Danielle Tyler's contact information: Phone (888)-562-8880, ext. 1011 Email dtyler@formulafolios.com

Joel VanWoerkom

Managing Member / President

Date of Birth: 1977

Educational Background:

- Calvin College, BA 1999
- Western Michigan University, Masters of Business Administration (MBA), 2010
- Securities licenses: Series 65 license (active)

Business Experience:

- 01/2014 - Present, FormulaFolio Investments, LLC., Managing Member, President
- 08/2007 - Present, Retirement Wealth Advisors, Inc., President, Investment Advisor Representative
- 08/2005 - 08/2007, Vanguard Charter Academy, Teacher Aide
- 08/2004 - 08/2005, Waiakea Middle School, Teacher
- 08/2002 - 08/2004, Timberland Charter Academy, Teacher

Item 3 & 7: Disciplinary Information

As it relates to past, current or prospective clients, Joel VanWoerkom has not been involved in any legal or disciplinary events, has not been involved in arbitrations, has not been subject to self-regulatory organization or administrative proceedings and has not filed or planning to file a bankruptcy petition.

Item 4: Other Business Activities

Joel VanWoerkom is a licensed insurance agent. He may offer insurance products and receive normal and customary fees as a result of insurance sales. A conflict of interest may arise as these insurance sales may create an incentive to recommend products based on the compensation adviser and/or our supervised persons may earn and may not necessarily be in the best interests of the client.

Item 5: Additional Compensation

Joel VanWoerkom does not receive any economic benefits from anyone who is not a client for providing advisory services.

Item 6: Supervision

Joel VanWoerkom is supervised by Danielle Tyler, Chief Compliance Officer. She reviews Joel VanWoerkom's work through frequent office interactions.

Danielle Tyler's contact information: Phone (888)-562-8880, ext. 1011 Email dtyler@formulafolios.com