This brochure supplement provides information about Dustin Kyle Schick that supplements the Evergreen Private Wealth LLC brochure. You should have received a copy of that brochure. Please contact Dustin Kyle Schick if you did not receive Evergreen Private Wealth LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Dustin Kyle Schick is also available on the SEC's website at www.adviserinfo.sec.gov.

EVERGREEN
PRIVATE WEALTH

Form ADV Part 2B – Individual Disclosure Brochure

for

Dustin Kyle Schick

Personal CRD Number: 5191424
Investment Adviser Representative

6161 S Syracuse Way, Suite 240
Greenwood Village, CO 80111
(720) 617-2885
dschick@evergreenpwl.com

UPDATED: 10/01/2026

Item 2: Educational Background and Business Experience

Name: Dustin Kyle Schick **Born:** 1981

Educational Background and Professional Designations:

Education:

Financial Planning Certificate-Financial Planning, New York University - 2018

Master Of Business Administration- Finance, Brigham Young University - 2011

Bachelor Of Science- Business Marketing, Brigham Young University - 2006

Designations:

CFP® - Certified Financial Planner

The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP (with flame design) marks (collectively, the "CFP® marks") are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board").

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients.

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 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 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:

i. 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
ii. 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.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board's enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

(CTS™) - Certified Tax Specialist ™

- The CTS™ (Certified Tax Specialist™) is a professional designation granted in the United States by the Institute of Business & Finance (IBF).
- CTS™ is a voluntary designation; no federal or state law or regulation requires financial planners to hold the CTS™ designation. It is a graduate-level designation conferred upon candidates who complete a 135+ hour educational program focusing on personal income taxes and methods to reduce tax liability. CTS™ certification requires mastery of the basic income tax formula and its computation, retirement plans, deductions, credits, capital gains, depreciation, payroll taxes and tax planning.
- To attain the right to use the CTS™, an individual must satisfactorily fulfill the following requirements: Pass two comprehensive exams, complete a written case study, and adhere to the IBF Code of Ethics and IBF Standards of Practice as well as fulfill annual continuing education requirements. The CTS™ program is designed for brokers and advisors who have clients interested in maximizing their after-tax returns as well as reducing their overall tax liability.

CPWA® - Certified Private Wealth Advisor

The CERTIFIED PRIVATE WEALTH ADVISOR (CPWA®) designation is an advanced professional certification awarded by the Investments & Wealth Institute. The program is designed for financial advisors who serve high-net-worth clients and focuses on the life cycle of wealth, including accumulation, preservation, and distribution.

To obtain the CPWA® designation, candidates must meet minimum eligibility requirements, including at least five years of relevant financial services experience and a clean regulatory record. Candidates are required to complete an executive education program through an approved provider and pass a comprehensive examination.

CPWA® certificants are required to adhere to the Investments & Wealth Institute Code of Professional Responsibility. In addition, designees must complete 40 hours of continuing education every two years, including at least 2 hours of ethics education, in order to maintain the designation. Failure to comply with these requirements may result in the suspension or revocation of the designation.

Business Background:

01/2023- Present	Chief Operating Officer and IAR Evergreen Private Wealth LLC
01/2023- 12/2025	Chief Compliance Officer Evergreen Private Wealth LLC
07/2020 – 07/2023	Chief Operating Officer and IAR Independent Financial Partners
01/2018 - 07/2020	Financial Representative Fidelity Brokerage Services, LLC
04/2017 - 01/2018	Emergency Air Medical Industry Consultant Self-employed
08/2012 - 04/2017	Director of Finance and Operations Air Methods Corporation
07/2011 - 07/2012	Financial Analyst Intel Corporation

Item 3: Disciplinary Information

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

Item 4: Other Business Activities

Dustin Kyle Schick is not engaged in any investment-related business or occupation (other than this advisory firm).

Item 5: Additional Compensation

Dustin Kyle Schick does not receive any economic benefit from any person, company, or organization, other than Evergreen Private Wealth LLC in exchange for providing clients advisory services through Evergreen Private Wealth LLC.

Item 6: Supervision

As a representative of Evergreen Private Wealth LLC, Dustin Schick is supervised by Liz Manteau, the firm's Chief Compliance Officer. Liz Manteau is responsible for ensuring that Dustin Schick 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 Liz Manteau is (720) 549-3303.