This brochure supplement provides information about Scott Anthony Preston that supplements the Evergreen Private Wealth LLC brochure. You should have received a copy of that brochure. Please contact Scott Anthony Preston 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 Scott Anthony Preston is also available on the SEC's website at www.adviserinfo.sec.gov.

EVERGREEN
PRIVATE WEALTH

Form ADV Part 2B – Individual Disclosure Brochure

for

Scott Anthony Preston

Personal CRD Number: 5549500
Investment Adviser Representative

6161 S Syracuse Way, Suite 240
Greenwood Village, CO 80111
(720) 617-2882
spreston@evergreenpwl.com

UPDATED: 10/01/2026

Item 2: Educational Background and Business Experience

Name: Scott Anthony Preston **Born:** 1981

Educational Background and Professional Designations:

Education:

Bachelor Of Arts Psychology, University of Utah - 2008

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.

Business Background:

12/2022 - Present	Managing Partner Evergreen Private Wealth LLC
08/2019 – 07/2023	Managing Partner and IAR Independent Financial Partners
08/2019 - 08/2020	Registered Rep IFP Securities, LLC
10/2016 - 08/2019	Registered Rep LPL Financial
10/2016 - 08/2019	Investment Advisor Representative Global Retirement Partners

05/2008 - 10/2016	Financial Representative Fidelity Investments

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

Scott Anthony Preston is not engaged in any investment-related business or occupation (other than this advisory firm). He is involved in the following volunteer positions:

Scott Preston is the Head Coach for the SOHO Junior Development mountain bike team, now in its third year. He designs and leads structured training programs, ensuring athletes excel in mountain biking. Scott collaborates with strength trainers and ski coaches to create a comprehensive plan for athlete development. He also oversees training camps and races. Scott volunteers his time to support the athletes. He dedicates 5 hours/month during trading hours and 10 hours outside of trading hours, with no compensation from this role.

Scott Preston also serves as a Board Member for the Utah NICA Mountain Bike League, a volunteer role. He acts as a liaison between high school coaches and the league, gathering feedback, suggesting race planning improvements, and contributing to league development. Scott dedicates 4 hours per month outside trading hours, with no compensation.

Lastly, Scott Preston serves as the Head Coach for the Wasatch High School Mountain Bike Team in a volunteer role. He creates training plans, coordinates activities, and provides organizational support. Scott fosters a positive, inclusive environment for student-athletes while developing structured practice plans. He dedicates 10 hours per month during trading hours and 40 hours outside trading hours, with no compensation.

Item 5: Additional Compensation

Scott Anthony Preston 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, Scott Anthony Preston is supervised by Liz Manteau, the firm's Chief Compliance Officer. Liz Manteau is responsible for ensuring that Scott Anthony Preston 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.