



nVest Advisors

Advisor Brochure Supplement

Form ADV Part 2B

March 30, 2018

Jeremy Todd Torgerson
CRD # 5546264

nVest Advisors

This brochure provides the prospective investor with pertinent information about the qualifications and business practices of Jeremy Todd Torgerson. If you have any questions about the contents of this brochure, please contact us at 888-852-0702 and/or via email at jtorgerson@nvestadvisors.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.

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Additional information about Jeremy Todd Torgerson (CRD 5546264) is available on the SEC's website at www.adviserinfo.sec.gov.

Educational Background & Business Experience

I was born in 1971 in Denver, Colorado.

Formal Education

Patten University, San Francisco, CA
B.A. Management / Leadership (in progress)

Recent Work Experience

I have the following business background for the previous 10 years:

Employment Dates: 10/2015 to Present
Business Name: nVest Advisors, LLC
Investment Related: Yes
City: Brownsville
State: TX
Position Held: Managing Member, Financial Advisor & CEO

Employment Dates: 08/2011 to 10/2015
Company Name: SWS Financial Services, Inc.
D/B/A: Palo Alto Investments
Investment Related: Yes
City: Brownsville
State: TX
Position Held: Independent Financial Advisor D/B/A Palo Alto Investments

Employment Dates: 06/2008 to 08/2011
Business Name: Edward Jones Investments
Investment Related: Yes
City: Los Fresnos
State: TX
Position Held: Financial Advisor

Securities Exams and Insurance Licenses

In addition to being an Investment Adviser Representative, I hold the following insurance licenses:

Life; Health; Annuity
They are held in the following states: Texas.

Professional Designations

I do not hold any professional designations.

Disciplinary Information

I have not been involved in any disciplinary actions.

Other Business Activities

Investment-Related OBAs

I receive no additional economic benefits that could create a material conflict of interest that I have not included below.

1) Personal Finance Blog

I own and operate a personal finance blog called "Think Like A Rich Guy" (thinklikearichguy.com) Activities include article posts, videos and podcasts, with eventual subscription services (online workshops) affiliate programs, and ad placement on the site. This activity constitutes approximately 15% of my professional time.

Non-Investment Related OBAs

I receive occasional additional economic benefits and perform various work as a freelance professional actor and voice actor. I perform in both paid and unpaid roles in my personal time. This work is wholly unrelated to my work as a financial advisor and poses no conflict of interest to my duties as a financial advisor. This activity constitutes less than 10% of my time during business hours.

Additional Compensation

No one provides me any additional economic benefit for providing advisory services.

Supervision

I supervise the quality of the advice given to my clients. I have access to your custodial account statements and your performance reports, which I review. I also meet with you at least annually to confirm your accounts' investments and asset allocation remain appropriate for your investment objectives.

I am supervised by nVest Advisors, LLC at several levels, carry a surety bond, and am insured against errors and omissions during the conduct of my duties as a financial advisor. Annually, I attest that I understand the policies and procedures related to my offering of advisory services and must complete various Continuing Education requirements to maintain an insurance license.

Requirements for State-Registered Advisers

Investment Adviser Representatives are required to publicly disclose any matters that may adversely affect or attest to their ability to act in a fiduciary capacity, at any time after becoming an IAR, and for a period of years prior to becoming an IAR.

For the time frames required by such regulations, I attest:

I have never been involved in any injunctive, arbitration or administrative proceeding.

I have never been subject to any civil or administrative award or finding of liability.

I have not been involved in a bankruptcy petition or other financial matter requiring disclosure.



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