



INVESTRUST
CONSULTING

Part 2B of Form ADV: *Firm Brochure Supplement*

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This brochure supplement provides information about Steve Replogle that supplements the InvesTrust Consulting, LLC brochure (ADV Part 2). You should have received a copy of that brochure. Please contact Shannon Carter, Chief Compliance Officer if you did not receive InvesTrust Consulting's brochure or if you have any questions about the contents of this supplement.

Additional information about InvesTrust Consulting, LLC can be found on the SEC's website at www.adviserinfo.sec.gov.



Brochure Supplement (Part 2B of Form ADV)

Steve Replogle, CFA, CPA, CTFA

ITEM 2: EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE:

Steve Replogle, born in 1955, received a B.S. in Marketing from Eastern Illinois University (1979). In 1985, Steve earned his Certified Public Accountant (CPA) designation. In 2002, he earned the Certified Trust and Financial Advisor (CTFA) designation. And, in 2007, Steve obtained the designation of Chartered Financial Analyst (CFA).

Steve Replogle became a Consultant for InvesTrust Consulting in 2020. Prior to InvesTrust Consulting, Steve served as a senior wealth advisor for Mariner Wealth Advisors (2015-2017). Steve also served as Vice President and Trust Officer at Bank of Oklahoma (2008-2015).

ITEM 3: DISCIPLINARY INFORMATION:

There have been no disciplinary actions against Steve Replogle.

ITEM 4: OTHER BUSINESS ACTIVITIES:

In addition to serving as a Consultant for InvesTrust Consulting, Steve is also the Director of Trust Services for InvesTrust. All InvesTrust Consulting employees are employees of InvesTrust Wealth Management, LLC. As such, some of InvesTrust Consulting's employees may also serve as employees of InvesTrust. This means some employees receive compensation that is related to their work for InvesTrust. He is not, nor does he have a pending application for registration with a broker-dealer or other investment firm.

ITEM 5: ADDITIONAL COMPENSATION:

See Item 4. Steve does not receive any bonus that is based, all or in part, on the number or amount of sales, client referrals, or new accounts for InvesTrust Consulting. Also, he does not receive any economic benefit from anyone who is not a client for providing advisory services.

ITEM 6: SUPERVISION:

Steve Replogle is supervised by Mark Williams. Mark reviews Steve's work through frequent office interactions as well as remote interactions. Mark's phone number is (405) 843-7046 and his email is mwilliams@investrust.com. Steve's compliance-related activities are monitored by InvesTrust Consulting's CCO, Shannon Carter.

Professional Designations

This Summary of Professional Designations is provided to assist you in evaluating the professional designations and minimum requirements of our investment professionals who hold these designations.

CFA: Chartered Financial Analyst

A Chartered Financial Analyst is a professional designation issued by the CFA Institute which measures the qualifications and trustworthiness of financial professionals. A CFA candidate must pass three course exams in the following areas: portfolio management, accounting, ethics, money management, and security analysis. Licensed CFAs are subject to rigorous ethics rules.

CFP®: Certified Financial Planner

The Certified Financial Planning Board of Standards (CFP Board) issues the CFP® certification to financial professionals who have met required on-the-job experience with clients, complete ongoing CFP coursework, and pass an exam that covers a broad spectrum of financial issues. Individuals who hold the CFP® certification also agree to abide by the CFP Board's Standards of Professional Conduct as a key component. The CFP Board is responsible for interpreting and enforcing the ethical duties and standards it imposes on CFP® professionals. Certified Financial Planner Board of Standards, Inc. (CFP Board) owns the CFP® certification mark, the CERTIFIED FINANCIAL PLANNER™ certification mark, and the CFP® certification mark (with plaque design) logo in the United States, which it authorizes use of by individuals who successfully complete CFP Board's initial and ongoing certification requirements.

CPA: Certified Public Accountant

A certified public accountant (CPA) is a designation given by the American Institute of Certified Public Accountants (AICPA) to individuals that pass the Uniform CPA Examination and meet the education and experience requirements. The CPA designation helps enforce professional standards in the accounting industry.

CTFA: Certified Trust and Financial Advisor

The Certified Trust and Financial Advisor (CTFA) is a professional designation offered by the American Bankers Association (ABA), which provides training and knowledge in taxes, investments, financial planning, trusts, and estates.

IACCP®: Investment Advisor Certified Compliance Professional

An Investment Advisor Certified Compliance Professional designation issued by National Regulatory Services "NRS" is sponsored by the Investment Advisor Association and NRS which measures qualification of compliance professionals. An IACCP candidate must complete 20 hours of courses and one certifying exam in the following areas: The Advisors Act, Ethics, and Disclosure.

Series 65 License

Series 65 is a securities license issued by the North American Securities Administrators Association (NASAA) that is administered by FINRA, which allows individuals to serve as investment advisors. Candidates who passed the Series 65 exam were tested on the following areas: laws, regulations, ethics, and investment products.