

# **Sustainable Advisors Alliance, LLC**

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Tulsa, OK 74103

**Telephone: (918) 408-7981**

**March 29, 2023**

## **FORM ADV PART 2B BROCHURE SUPPLEMENT**

**Julie Lynn Skye**

This brochure supplement provides information about Julie Lynn Skye that supplements the Sustainable Advisors Alliance, LLC brochure. You should have received a copy of that brochure. Contact us at (918) 408-7981 if you did not receive Sustainable Advisors Alliance, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Julie Lynn Skye CRD # 1513147 is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2 Educational Background and Business Experience

### Julie Lynn Skye

*Year of Birth:* 1954

*Formal Education After High School:*

- Tulsa University, BSBA in Finance, 1985
- Tulsa University, Master of Business Administration, Economics and Organizational Change, 1990

*Business Background:*

- Sustainable Advisors Alliance LLC, Principal & CCO, 01/2021 - Present
- Skye Advisors, LLC, Principal & CCO, 12/2017 – 01/2022
- First Point, Advisor, 08/2014 - 12/2017
- Mariner Wealth Advisors, Senior Wealth Advisor, 08/2014 -12/2017
- Pinnacle Investment Advisors, Advisor, 06/2005 - 07/2014
- Heritage Trust, Trust Investment Officer, 06/2002-06/2005

### Portfolio Management Services

Julie Skye focuses on providing Sustainable, Responsible, Impact (SRI) investment portfolios that integrate her client's most important Environmental, Social & Governance (ESG) preferences. Each client is involved with the creation of their optimal portfolio, and Julie Skye will manage all of steps involved with implementing, monitoring, and reviewing the Portfolio.

Ms. Skye uses a manager due diligence process that has been adopted by the firm to ensure there is a consistent process used to vet the mutual funds and ETFs that will be used in her Model Portfolios. Each client also has the option to direct specific stocks, of their choosing, as part of building out their portfolio.

As a Fiduciary, Skye adheres to the firm's fiduciary responsibility to clients of the firm. She uses a Risk Tolerance Questionnaire in combination with a Sustainable Impact Preference Questionnaire to help each client explore, and then, develop, their unique goals and preferences. An Investment Policy Statement (IPS) is developed that integrates Risk, Impact References and identifies the securities that will be used, in conjunction with the many other details that are included in creating a customized Portfolio.

Once the client has approved and signed the Investment Policy Statement, Ms. Skye uses that IPS to place the trades, considering the timing of the trades, the share class specified and the timing of future trades: dollar cost averaging is the typical process used to become fully invested. Over the time that the portfolio is being built out, there is communication between Ms. Skye, in conjunction with the Quarterly Reports that are provided following quarter-end.

Ms. Skye reviews all portfolios at least annually to ensure that portfolios are aligned with a client's stated objectives and risk tolerance. As a client's situation changes, Ms. Skye will revisit their Risk Tolerance to determine if the Investment Policy Statement needs to be amended.

As part of the Annual Meeting, Ms. Skye reviews the IPS and the client's state goals and risk tolerance to ensure the portfolio reflects the client stated objectives and risk tolerance. Ms. Skye is available for additional meetings at the request of the client.

### **Item 3 Disciplinary Information**

Form ADV Part 2B requires disclosure of certain criminal or civil actions, administrative proceedings, and self-regulatory organization proceedings, as well as certain other proceedings related to suspension or revocation of a professional attainment, designation, or license. Mr/Mrs. Julie Lynn Skye has no required disclosures under this item.

### **Item 4 Other Business Activities**

Julie Lynn Skye, CCO is not involved with outside business activities.

### **Item 5 Additional Compensation**

Julie Lynn Skye does not receive any additional compensation beyond that received as an Investment Advisor Representative of Sustainable Advisors Alliance, LLC.

### **Item 6 Supervision**

As the CCO of Sustainable Advisors Alliance, LLC, Julie Lynn Skye supervises the advisory activities of our firm. Julie Lynn Skye can be reached at (918) 408-7981.