

Cascade Wealth Advisors, Inc.
ADV Part 2B Brochure Supplement

Item 1 – Cover Page

Scott Thomas Blaesing
Cascade Wealth Advisors, Inc.

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Wenatchee, WA 98801

(509) 886-8866

March 15, 2024

This Brochure Supplement provides information about Scott Thomas Blaesing that supplements the Cascade Wealth Advisors, Inc. Brochure. You should have received a copy of that Brochure. Please contact Cascade Wealth at (509) 886-8866 if you did not receive our Brochure or if you have any questions about the contents of this supplement.

Additional information about Scott Thomas Blaesing is available on the SEC's website at www.adviserinfo.sec.gov.

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Item 2 – Educational Background and Business Experience

Scott Thomas Blaesing, CPA, CFP® (Born in 1973)

Formal Education After High School

Washington State University, B.A. degree Accounting and Finance 1996

Business Experience

President and CCO, Cascade Wealth Advisors, Inc.	May 2012 to Present
President, Cascade Tax and Accounting, Inc.	December 2010 to Present
President, Icon Capital & Development	May 2004 to December 2010
President, Commander Northwest Aviation	November 2001 – May 2007
Quellos Group (Blackrock) – Relationship Manager	March 2002 – May 2003
VergePointe – Relationship Manager	January 1999 – March 2002

Professional Designations

CPA - Certified Public Accountant

Issued by: Washington State Board of Accountancy June 2002. Oregon 1999 initial license.

Prerequisite: Candidate must meet the following requirements:

- At least 150 semester credits of college education, including:
- A baccalaureate degree or higher
- 24 semester credits in accounting subjects with 15 credits at the upper or graduate level
- 24 semester credits in business administration subjects

Exam: CPA Certification Examination

Continuing Education Requirement: 120 hours every 3-years

CFP® – Certified Financial Planner™

Mr. Blaesing received the CFP® (Certified Financial Planner™) designation in February 2014.

The CFP® certification is a voluntary certification issued by the Certified Financial Planner Board of Standards, Inc. 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.

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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, administered in 10 hours over a two-day period, includes case studies and client scenarios designed to evaluate 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 fulltime 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[®] designation:

- 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
- 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.

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Item 3- Disciplinary Information

We are required to disclose all material facts regarding any legal or disciplinary events that would be related to your evaluation of Mr. Blaesing. Mr. Blaesing has not been involved in any such events and therefore we have no information applicable to this Item to report.

Item 4- Other Business Activities

We are required to disclose certain information about certain outside business activities in which Mr. Blaesing is actively engaged. Mr. Blaesing currently owns a CPA practice in Washington and his areas of concentration are small business consulting, taxation, and accounting. He spends about 10% of his time managing the Public Accounting practice and 90% on the Registered Investment Advisory business.

Item 5- Additional Compensation

We are required to disclose any economic benefit that someone who is not a client provides to Mr. Blaesing for providing advisory services. Mr. Blaesing receives a fee for services for his work as a CPA at Cascade Tax & Accounting, a 100% owned affiliate.

Item 6 – Supervision

Cascade Wealth investment adviser representatives and employees are required to adhere to the Cascade Wealth Compliance Manual in the performance of their daily activities and responsibilities to Cascade Wealth and you. Our Compliance Manual includes an overview of the various federal and state statutes and regulations governing Cascade Wealth operations and our policies and procedures, which are designed to comply with applicable regulations and to facilitate the timeliness and quality of our compliance activities.

Mr. Scott Blaesing, President and CCO, is responsible for supervising all advisory activities on behalf of Cascade Wealth pursuant to its written compliance policies and procedures. If you have any questions or concerns about your account, you are asked to contact Mr. Blaesing by calling (509) 886-8866.

Item 7- Requirements for State-Registered Advisers

This Item is not applicable to us because we are registered with the U.S. Securities and Exchange Commission.