

## **Item 1 Cover Page**

A.

**Jeffery Sorensen**

OverRidge Wealth Advisors

ADV Part 2B, Brochure Supplement  
Dated: February 17, 2026

Contact: Dane Petty, Chief Compliance Officer  
6300 Ridglea Place, Suite 1020  
Fort Worth, TX 76116

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**This Brochure Supplement provides information about Jeffery Sorensen that supplements the OverRidge Wealth Advisors Brochure; you should have received a copy of that Brochure. Please contact Dane Petty, Chief Compliance Officer, if you did *not* receive OverRidge Wealth Advisors' Brochure or if you have any questions about the contents of this supplement.**

**Additional information about Jeffery Sorensen is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov)**

## **Item 2 Education Background and Business Experience**

Jeffery Sorensen was born in 1962. Mr. Sorensen graduated from Redlands University in 1992 with a Bachelor of Science degree in Business Management. Mr. Sorensen joined OverRidge Wealth Advisors as an Investment Adviser Representative in April 2025. Mr. Sorensen was previously an Investment Adviser Representative with Triad Hybrid Solutions from February 2018 through February 2024 and with Osaic Advisory Services from February 2024 through March 2025. Mr. Sorensen was also a registered representative with Triad Advisors, Inc. from October 2010 through August 2024 and Osaic Wealth from August 2024 through March 2025.

## **Item 3 Disciplinary Information**

None.

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

A. **Licensed Insurance Agent.** Mr. Sorensen, in his individual capacity, is a licensed insurance agent, and may recommend the purchase of certain insurance-related products on a commission basis. Clients can engage Mr. Sorensen to purchase insurance products on a commission basis. **Conflict of Interest:** The recommendation by Mr. Sorensen that a client purchase an insurance commission product presents a *conflict of interest*, as the receipt of commissions may provide an incentive to recommend investment products based on commissions received, rather than on a particular client's need. No client is under any obligation to purchase any insurance commission products from Mr. Sorensen. Clients are reminded that they may purchase insurance products recommended by Mr. Sorensen through other, non-affiliated insurance agents. **The Registrant's Chief Compliance Officer, Dane Petty, remains available to address any questions that a client or prospective client may have regarding the above conflict of interest.**

**Registered Representative.** Mr. Sorensen, in his individual capacity, is a registered representative of Mutual Securities, Inc., an unaffiliated broker-dealer. Mr. Sorensen maintains this registration for the purpose of collecting trail commission only, and Mr. Sorensen does not engage in new commission-based securities sales. To the extent Registrant is engaged to provide management services with respect to a variable annuity owned by a client, and for which Mr. Sorensen continues to collect a trail commission, Registrant will exclude the value of such variable annuity from the client's assets under management for the purpose of calculating Registrant's asset-based fee. Variable annuities owned by clients for which Registrant provides management services, but for which no ongoing trail commissions are collected by Mr. Sorensen, are generally included in Registrant's asset-based fee calculations, unless otherwise agreed. **The Registrant's Chief Compliance Officer, Dane Petty, remains available to address any questions that a client or prospective client may have regarding this other business activity.**

B. **ProVisors.** Mr. Sorensen is a member of the Executive Committee for ProVisors, a networking organization for independent investment advisers. In this role, Mr. Sorensen is generally responsible for planning meetings, attracting new members, and developing new business. Mr. Sorensen does not use this role to solicit new advisory clients for Registrant, and no ProVisors member is under any obligation to become an advisory client of Registrant. As such, it is not expected that this activity will present material conflicts of interest for clients of Registrant.

#### **Item 5 Additional Compensation**

None.

## **Item 6 Supervision**

The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4)-7 policies and procedures is to comply with the supervision requirements of Section 203(e)(6) of the Investment Advisers Act of 1940 (the "Act"). The Registrant's Chief Compliance Officer, Dane Petty, is primarily responsible for the implementation of the Registrant's policies and procedures and overseeing the activities of the Registrant's supervised persons. Should an employee or investment adviser representative of the Registrant have any questions regarding the applicability/relevance of the *Act*, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Mr. Petty at (817) 738-1451.