TRELLIS WEALTH
ADVISORS

March 23, 2020

Dear Clients and friends of Trellis,

Each year, Trellis Wealth Advisors is required to submit information to the SEC about our firm's assets, investments, and operations via a filing called "Form ADV." We deliver this disclosure document before we begin a client relationship, as well as when there are material changes to our ADV. Our current ADV can be found on the SEC's website at here.

Each year, this filing is due on March 30th. This year, due to the unprecedented market activity surrounding the COVID-19 pandemic, the SEC has granted registered investment advisors a 45-day extension to file their Form ADV.

Preparing our ADV is something we take very seriously and we take considerable time and care to prepare it. We are requesting an extension for this filing so we can focus on delivering the best guidance and advice to our clients during these fast-moving markets. We will complete our ADV filing by May 7, 2020.

Please know that we have full functionality at our home offices and at our Trellis office. San Luis Obispo is under a "shelter at home" order and while Trellis is deemed an essential business, we are splitting the team between the office and our home offices out of an abundance of caution. While you can call the main office line at (805) 548-8920, you may also reach us directly at:

Kevin Okimoto	Kevin@trelliswealth.com	(415) 640-7081 cell
Scott Whitcher	Scott@trelliswealth.com	(415) 515-6151 cell
Mark Thompson	Mark@trelliswealth.com	(650) 269-7561 cell
Carrie Miller	Carrie@trelliswealth.com	(415) 515-6222 cell

Thank you for your understanding and do not hesitate to reach out to any of us at any time if you have questions or concerns.

Kevin, Scott, Mark and Carrie