

Form ADV, Part 2B, Brochure Supplement
March 30, 2024

John D. Frankola, CFA
Portfolio Manager, CEO

Vista Investment Management, LLC
400 Penn Center Boulevard, Suite 555
Pittsburgh, PA 15235

412-228-5768
www.vista-im.com

This brochure supplement provides information about John D. Frankola that supplements the Vista Investment Management, LLC (“Vista”) brochure. You should have received a copy of that brochure. Please contact us at 412-824-5940 or www.vista-im.com if you did not receive Vista’s brochure or if you have questions about the contents of this supplement. Additional information about John D. Frankola and Vista Investment Management is available on the SEC’s web site at www.adviserinfo.sec.gov.

Material Changes

Revised March 30, 2024

This section describes only material changes since the last amendment, performed March 30, 2023.

There have been no material changes.

Educational Background and Business Experience

John D. Frankola (born 1954) is a Portfolio Manager and is the firm's CEO. He has served in these positions since Vista's inception in 2002. He received a Bachelor of Science degree in Accounting from Pennsylvania State University (University Park, PA) and a Master of Business Administration degree from the University of Pittsburgh. He became a Certified Public Accountant (CPA) in 1978 and attained the designation Chartered Financial Analyst (CFA) in 1990. Mr. Frankola does not maintain an active CPA license and is not involved in the practice of accounting.

Prior to the establishment of Vista, Mr. Frankola served as Senior Portfolio Manager for Parker/Hunter Incorporated (since acquired by Janney Montgomery Scott LLC), a registered investment adviser and broker/dealer. In this position he was responsible for the supervision of Parker/Hunter's Asset Management Division (1994-2001). Mr. Frankola worked at Parker/Hunter from 1987 to 2001.

Notes:

The **Chartered Financial Analyst (CFA)** designation is an international professional certification awarded by the CFA Institute to financial analysts. To become a CFA, an individual must pass three six-hour exams, possess a bachelor's degree, and have four years of qualified investment experience.

A **Certified Public Accountant (CPA)** license is granted to qualified accountants in the United States who have passed the Uniform Certified Public Accountant Examination and have met additional education and experience requirements. The licensing requirements vary by state, but generally require at least a bachelor's degree and two years of relevant experience.

Disciplinary Information

John D. Frankola has no legal or disciplinary history to disclose.

Other Business Activities

John D. Frankola is not engaged in any other business activities that provide a substantial source of income or involve a substantial amount of time.

Additional Compensation

John D. Frankola does not receive additional compensation from persons who are not clients for providing advisory services.

Supervision

John, as CEO, is the principal of Vista's supervisory structure. Accordingly, he has direct or indirect supervisory authority over all the firm's investment advisory representatives, including himself. He can be reached at (412) 824-5940. Although John does not have a direct supervisor, his activities are monitored by Vista's other investment advisory personnel.

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Matthew J. Viverette
CCO, COO
Research Analyst, Assistant Portfolio Manager

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Pittsburgh, PA 15235

412-228-5768
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This brochure supplement provides information about Matthew J. Viverette that supplements the Vista Investment Management, LLC (“Vista”) brochure. You should have received a copy of that brochure. Please contact us at 412-824-5940 or www.vista-im.com if you did not receive Vista’s brochure or if you have questions about the contents of this supplement. Additional information about Matthew J. Viverette and Vista Investment Management is available on the SEC’s web site at www.adviserinfo.sec.gov.

Material Changes

Revised March 30, 2024

This section describes only material changes since the last amendment, performed March 30, 2023.

There have been no material changes.

Educational Background and Business Experience

Matthew J. Viverette (born 1985) oversees Technology and Operations for Vista. In addition, he provides research and portfolio management support as a Research Analyst and Assistant Portfolio Manager. He has held these positions since joining the firm in 2014. In 2018 he assumed the role of Chief Compliance Officer, and in 2022 he assumed the role of Chief Operations Officer. He received a Bachelor of Science degree in Economics and a Bachelor of Science degree in Business Administration, with a Finance concentration, from the University of Pittsburgh in 2009.

Prior to joining Vista, Mr. Viverette worked for PNC Financial Services Group, where he was a member of the Strategic Initiatives Office from 2011 to 2014. Additionally, Mr. Viverette served as an Information Technology Analyst for Cancer Treatment Services International from 2009 to 2011.

Disciplinary Information

Matthew J. Viverette has no legal or disciplinary history to disclose.

Other Business Activities

Matthew J. Viverette is not engaged in any other business activities that provide a substantial source of income or involve a substantial amount of time.

Additional Compensation

Matthew J. Viverette does not receive additional compensation from persons who are not clients for providing advisory services.

Supervision

Matthew J. Viverette reports to John D. Frankola, the firm's CEO, who can be reached at (412) 824-5940. Advice given to clients is discussed on a regular basis. Mr. Frankola has access to electronic communications records, including e-mail and telephone call detail records ("CDRs").

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Lawrence E. Eakin, Jr.
Portfolio Manager, Research Analyst

Vista Investment Management, LLC
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This brochure supplement provides information about Lawrence E. Eakin that supplements the Vista Investment Management, LLC (“Vista”) brochure. You should have received a copy of that brochure. Please contact us at 412-824-5940 or www.vista-im.com if you did not receive Vista’s brochure or if you have questions about the contents of this supplement. Additional information about Lawrence E. Eakin and Vista Investment Management is available on the SEC’s web site at www.adviserinfo.sec.gov.

Material Changes

Revised March 30, 2024

This section describes only material changes since the last amendment, performed March 30, 2023.

There have been no material changes.

Educational Background and Business Experience

Lawrence E. Eakin, Jr. (born 1962) serves as a Portfolio Manager and Research Analyst for Vista. He has held these positions since joining the firm in 2018. He received a Bachelor of Science in Computer Applications Information Systems in 1986 from Clarion University of Pennsylvania and a Master of Business Administration from Duquesne University in 1993.

Prior to joining Vista, he worked in various investment research and management capacities at Federated Investors, Rockhaven Asset Management, Strong Capital Management, Allegiant Asset Management, and most recently, Guyasuta Investment Advisors. He also co-founded a telehealth company, Iagnosis, Inc., in 2010.

Disciplinary Information

Lawrence E. Eakin, Jr. has no legal or disciplinary history to disclose.

Other Business Activities

Lawrence E. Eakin, Jr. is not engaged in any other business activities that provide a substantial source of income or involve a substantial amount of time.

Additional Compensation

Lawrence E. Eakin does not receive additional compensation from persons who are not clients for providing advisory services.

Supervision

Lawrence E. Eakin, Jr. reports to John D. Frankola, the firm's CEO, who can be reached at (412) 824-5940. Advice given to clients is discussed on a regular basis. Mr. Frankola has access to electronic communications records, including e-mail and telephone call detail records ("CDRs").

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Dylan C. T. Dunlop
Operations & Investment Analyst

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Material Changes

March 30, 2024

This section is reserved to describe material changes in a future amendment.

Educational Background and Business Experience

Dylan Connor Thomas Dunlop (born 1992) serves as an Operations & Investment Analyst for Vista. He has held these positions since joining the firm in 2023. He received a Bachelor of Science degree in Finance, with an Investment Management concentration, from Virginia Tech in 2016.

Prior to joining Vista, he worked at Merrill as a registered wealth management client associate. He previously held various roles as an investment professional, working for both UBS and Vanguard.

Disciplinary Information

Dylan C. T. Dunlop has no legal or disciplinary history to disclose.

Other Business Activities

Dylan C. T. Dunlop is not engaged in any other business activities that provide a substantial source of income or involve a substantial amount of time.

Additional Compensation

Dylan C. T. Dunlop does not receive additional compensation from persons who are not clients for providing advisory services.

Supervision

Dylan C. T. Dunlop reports to John D. Frankola, the firm's CEO, who can be reached at (412) 824-5940. Advice given to clients is discussed on a regular basis. Mr. Frankola has access to electronic communications records, including e-mail and telephone call detail records ("CDRs").