

**Form ADV Part 2B – Brochure Supplement
Item 1 – Cover Page
June 2013**

Glenn Morris

**Morris Wealth Management
2807 Childress Drive
Anderson, CA 96007**

**Firm Contact:
Glenn Morris, President & Chief Compliance Officer**

**Firm Website Address:
www.MorrisWealth.net**

This brochure supplement provides information about Glenn Morris that supplements our brochure. You should have received a copy of that brochure. Please contact Glenn by phone at (530) 365-1234 or e-mail at gmorris@morriswealth.net if you did not receive Morris Wealth Management's brochure or if you have any questions about the contents of this supplement.

Additional information about Glenn Morris is available on the SEC's website at www.adviserinfo.sec.gov by searching CRD# 2304786.

Item 2: Educational Background & Business Experience

Glenn Morris

Year of Birth: 1961

Educational Background:

- 1991; Loyola University; MBA – Finance
- 1985; Loyola University; Bachelor's Degree

Business Background:

- 04/2013 – Present; Morris Wealth Management
- 07/1997 – 04/2013; LPL Financial

Exams, Licenses & Other Professional Designations:

- 07/1987; Certified Public Accountant
- 12/1992; Series 7
- 01/1993; Series 63
- 10/1997; Series 24
- 04/1993; Insurance License
- 01/2004; Certified Financial Planner

Certified Public Accountant (CPA)

CPAs are licensed and regulated by their state boards of accountancy. Experience and testing requirements for licensure as a CPA generally include minimum college education, minimum experience levels, and successful passage of the Uniform CPA Examination. In order to maintain a CPA license, states generally require the completion of continuing professional education. Additionally, all American Institute of Certified Public Accountants (AICPA) members are required to follow a rigorous *Code of Professional Conduct* which requires that they act with integrity, objectivity, due care, competence, fully disclose any conflicts of interest (and obtain client consent if a conflict exists), maintain client confidentiality, disclose to the client any commission or referral fees, and serve the public interest when providing financial services.

The CERTIFIED FINANCIAL PLANNER™, CFP®

The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP marks are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). The CFP® certification is a voluntary certification; 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 high standard of professional education, stringent code of conduct and standards of practice and ethical requirements that govern professional engagements with clients.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements: 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, pass the comprehensive CFP® Certification Examination, Complete at least three years of full-time financial planning-related experience and agree to be bound by CFP Board's *Standards of Professional Conduct*.

Individuals who become certified must 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 industry and 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.

Item 3: Disciplinary Information

There are no legal or disciplinary events material to your evaluation of Glenn Morris.

Item 4: Other Business Activities

Glenn Morris is an insurance agent/broker. He may offer insurance products and receive normal and customary fees as a result of insurance sales. A conflict of interest may arise as these insurance sales may create an incentive to recommend products based on the compensation the adviser and/or our supervised persons may earn and may not necessarily be in the best interests of the client.

Glenn Morris is also a CPA and as such, engages in income tax preparation. This business is investment related in terms of providing tax efficient investment advice. He spends 60 hours per month in this capacity from February through March. His duties entail gathering tax related client data, preparing tax returns, and advising on tax planning strategies.

Item 5: Additional Compensation

Glenn Morris does not receive any additional compensation or economic benefit outside of his regular salary such as any sales awards or other prizes.

Item 6: Supervision

Glenn Morris is the sole principal and as such has no internal supervision placed over him. He is, however, bound by our firm's Code of Ethics. He can be reached by phone at (530) 365-1234 or e-mail at gmorris@morriswealth.net.

Item 7: Requirements for State-Registered Advisers

Glenn Morris has not been involved in any arbitration claims alleging damages in excess of \$2,500. Furthermore, he has neither been involved in nor found liable in any civil, self-regulatory organization or administrative proceedings nor has he been the subject of any bankruptcy petitions.