

**Part 2B of Form ADV: *Brochure Supplement***

Nathaniel Phillip Carswell  
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Morton Wealth Management LLC

Greensboro, North Carolina 27408

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This brochure supplement provides information about Nathaniel Phillip Carswell that supplements the Morton Wealth Management LLC brochure. You should have received a copy of that brochure. Please contact Steven H. Morton if you did not receive Morton Wealth Management LLC's brochure or if you have any questions about the contents of this supplement.

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

## **Item 2 Educational, Background and Business Experience**

**Full Legal Name:** Nathaniel Phillip Carswell      **Born:** 1978

### **Education**

- Appalachian State University, Boone, North Carolina; BS; Sociology, 2003
- Alexander Central High School; HS Diploma; 1997

### **Business Experience**

- Morton Wealth Management; Financial Advisor; from October 2013 to Present
- Thrivent Financial for Lutherans; Financial Associate; from March 2009 to September 2013
- First Command Financial Services; Financial Advisor; from July 2007 to March 2009

### **Designations**

Mr. Carswell has earned the following designation(s) and is in good standing with the granting authority:

- Certified Financial Planner (CFP); Certified Financial Planner Board of Standards, Inc.; June 2012
- Chartered Advisor for Senior Living(CASL); The Board of Trustees of The American College; August 2013

## **Item 3 Disciplinary Information**

Mr. Carswell has no reportable disciplinary history.

## **Item 4 Other Business Activities**

### **Investment-Related Activities**

- Mr. Carswell is not engaged in any other investment-related activities.
- Mr. Carswell does not receive commissions, bonuses or other compensation on the sale of securities or other investment products.

### **Non Investment-Related Activities**

Mr. Carswell is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of his time.

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

Mr. Carswell does not receive any economic benefit from a non-advisory client for the provision of advisory services.

#### **Item 6 Supervision**

Mr. Carswell assists with financial planning and serves on the investment committee. His activities are supervised by Steven H. Morton, principal advisor and chief compliance officer.