

Part 2B of Form ADV: Firm Brochure

Merriman Wealth Advisors
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San Francisco, CA 94108

(415) 262-1377

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October 15, 2014

Michael Capobianco

40 Walnut Street
Wellesley, MA 02481

This Brochure Supplement provides information on our personnel listed above and supplements the Merriman Wealth Advisors, Inc. brochure. You should have also received a copy of the Brochure.

If you did not receive Merriman Wealth Advisors's brochure or if you have any questions about the content of this supplement, please contact us by e-mail at info@merrimanco.com or by phone at (781) 263-1600.

Additional information about Michael Capobianco is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2- Educational Background and Business Experience

Year of Birth: 1969

Designations:

- Licensed Registered Representative of a Broker Dealer
 - At minimum, to qualify for this status, one must pass Series 7 / Series 63 examinations administered by FINRA and must have his registration approved by FINRA.
- Licensed Investment Advisor Representative.
 - At minimum, to qualify for this status, one must pass Series 65 examination administered by FINRA and must have his registration approved by FINRA.

Education:

- BA, Boston University, Boston, MA, 1991

Recent Business Experience:

- Morton Wealth Advisors Inc.

Item 3- Disciplinary Information

Michael Capobianco has no legal or disciplinary events that are material to clients or prospective clients' evaluation of Mr. Capobianco.

Item 4- Other Business Activities

- Mr. Capobianco is a registered representative and an investment adviser representative of Triad Advisors. Additionally, he is a licensed insurance agent and offers life, disability, fixed and variable annuities and other insurance products. Mr. Capobianco is a Co-Founder of Morton Wealth Advisors and is compensated for the distribution of certain ETFs, mutual funds, and insurance products. This compensation includes management fees and commissions for brokerage services.
- Mr. Capobianco is a minority owner of Emerald Fund of Funds LLC. Emerald participates in the revenue from and has certain financial responsibilities to Crow Point Partners, LLC. Crow Point is a registered investment advisor with the SEC. Clients of Merriman Wealth Advisors may invest in the EAS Crow Point Fund of Funds, a registered investment company, which is managed by Crow Point Partners. Emerald has no operational role with the EAS Fund or with Crow Point.
- Mr. Capobianco is a minority owner of Vineyard Group LLC. Vineyard is a 50% member of Katama Capital Fund, LP. Clients of Merriman Wealth Advisors may invest in the Katama Fund. Vineyard has no operational role with the Katama Fund or distribution of the Katama Fund or with Katama.
- None of these relationships presents a conflict of interest that would be material to clients or prospective clients of Merriman Wealth Advisors.

Item 5- Additional Compensation

Mr. Capobianco does not receive any economic benefits from a person that is not a client of Morton for the provision of advisory services by Merriman Asset Management.

Item 6- Supervision

Mr. Capobianco is supervised by Howard Bernstein. Mr. Bernstein can be reached at (415) 262-1377.

Item 7 Requirements for State-Registered Advisers

A. Arbitration or Civil, Self-Regulatory Organization or Administrative Proceedings

An award or otherwise being found liable in an arbitration claim alleging damages in excess of \$2,500, involving any of the following:

- a. An investment or an investment-related business or activity;
- b. Fraud, false statement(s), or omissions;
- c. Theft, embezzlement, or other wrongful taking of property;
- d. Bribery, forgery, counterfeiting, or extortion; or
- e. Dishonest, unfair, or unethical practices.

Mr. Capobianco has never been a part of an arbitration proceeding.

2. An award or otherwise being found liable in a civil, self-regulatory organization, or administrative proceeding involving any of the following:

- a. An investment or an investment-related business or activity;
- b. Fraud, false statement(s), or omissions;
- c. Theft, embezzlement, or other wrongful taking of property;
- d. Bribery, forgery, counterfeiting, or extortion; or
- e. Dishonest, unfair, or unethical practices.

Mr. Capobianco has not been the subject of any civil, self-regulatory or administrative proceeding.

B. Bankruptcy History

Mr. Capobianco has not been the subject of a bankruptcy petition.