



Suzanne J. Burrell, CFP®

**6151 Shallowford Road, Suite 102
Chattanooga, TN 37421
423-510-0409**

**Firm Contact:
Luann Crane, Chief Compliance Officer**

**Firm Website Address:
www.guardianwealth.com**

This brochure supplement provides information about Suzanne J. Burrell that supplements our brochure. You should have received a copy of that brochure. Please contact Kathy VanLandingham if you did not receive GWM's brochure or if you have any questions about the contents of this supplement.

Additional information about Suzanne J. Burrell is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2: Educational Background & Business Experience

Suzanne J. Burrell, CFP®

Year of Birth: 1960

Education Background:

- University of Georgia, Athens, GA
 - Terry College of Business - Executive Program in Financial Planning (2012)
 - Educational requirement for Certified Financial Planner™ designation
- Carson Newman College, Jefferson City, TN
 - Bachelors (1982)
 - Tennessee Teaching Certifications in Business and English

Business Background:

- Guardian Wealth Management, Inc., Financial Advisor and Planner (May 2012 – Present)
- HHM Wealth Advisors, LLC, Financial Advisor (April 2010 – April 2012)
- Edward Jones Investments, Financial Advisor (07/2007 – 03/2010)
- Bradley County Schools/Cleveland City Schools, Teacher (08/2004 – 07/2007)

Professional Designations/Certifications:

- Earned FINRA Series 7 Securities and NASD Securities Series 66 Licenses as well as Tennessee and Georgia Life & Health Insurance Licenses while working in brokerage industry in 2007
- Earned the CERTIFIED FINANCIAL PLANNER™ certification in 2012

Certified Financial Planner

The CERTIFIED FINANCIAL PLANNER™, CFP®, and federally registered CFP (with flame design) marks (collectively, the “CFP® marks”) are professional certification marks granted in the United States by the 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 (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients. Currently, more than 62,000 individuals have obtained CFP® certification in the United States.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- Education – Complete an advanced college-level course of study addressing the financial planning subject areas that the 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). The CFP Board’s financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;
- Examination – Pass the comprehensive CFP® Certification Examination. The examination, administered in 10 hours over a two-day period, includes case studies and client scenarios

designed to test one's ability to correctly diagnose financial planning issues and apply one's knowledge of financial planning to real world circumstances;

- Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
- Ethics – Agree to be bound by CFP Board's Standards of Professional Conduct, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- Continuing Education – 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 planning field; and
- Ethics – 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 that CFP® professionals must provide financial planning services in the best interests of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to the CFP Board's enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

Item 3: Disciplinary Information

There are legal or disciplinary events material to the evaluation of Ms. Burrell.

Item 4: Other Business Activities

- A. If Suzanne J. Burrell is actively engage in any investment-related business or occupation, including if Ms. Burrell is registered, or has an application pending to register, as a broker-dealer, registered representative of a broker-dealer, futures commission merchant ("FCM"), commodity pool operator ("CPO"), commodity trading advisor ("CTA"), or an associated person of an FCM, CPO, or CTA, we are required to disclose this fact and describe the business relationship, if any, between the advisory business and the other business.

No other business activities exist for Ms. Burrell.

1. If a relationship between the advisory business and Ms. Burrell's other financial industry activities creates a material conflict of interest with you, the SEC requires us to describe the nature of the conflict and generally how we address it.

Ms. Burrell is a licensed insurance agent. Suzanne Burrell retains these licenses for advisory purposes only and sells no insurance nor receives any commissions or trailing commissions.

2. If Ms. Burrell receives commissions, bonuses or other compensation based on the sale of securities or other investment products, including as a broker-dealer or registered representative, and including distribution or service ("trail") fees from the sale of mutual

funds, we have to disclose this fact. If this compensation is not cash, we are required to explain what type of compensation Ms. Burrell receives. We must explain that this practice gives Ms. Burrell an incentive to recommend investment products based on the compensation received, rather than on your needs.

There is nothing further to disclose.

- B. If Ms. Burrell is actively engaged in any business or occupation for compensation not discussed in response to Item 4.A., above, and the other business activity or activities provide substantial source of Ms. Burrell's income or involve a substantial amount of Ms. Burrell's time, we are required to disclose this fact and must describe the nature of that business. If the other business activities represent less than 10 percent of Ms. Burrell's time and income, we may presume that they are not substantial.

There is nothing further to disclose.

Item 5: Additional Compensation

If someone who is not a client provides an economic benefit to Suzanne J. Burrell for providing advisory services, we are required to generally describe the arrangement. For purposes of this Item, economic benefits include sales awards and other prizes, but do not include Ms. Burrell's regular salary. Any bonus that is based, at least in part, on the number or amount of sales, client referrals, or new accounts should be considered economic benefit, but other regular bonuses should not.

There is nothing further to disclose.

Item 6: Supervision

We are required to explain how we supervise Suzanne J. Burrell, including how we monitor the advice she provides to you. Our firm has to provide the name, title and telephone number of the person responsible for supervising Ms. Burrell's advisory activities on behalf of our firm.

Ms. Burrell is supervised by the President and CEO, Donald C. VanLandingham, Jr. (423.510.0409), with respect to personal securities trades, insider trading, anti-money laundering practices through pre-clearance, regular reporting and continuing education as outlined in the firm's Written Supervisory Procedures and Compliance Manual.