

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

Jonathan White Stoller  
628 Green Valley Road, Suite 206  
Greensboro, NC 27408  
310-289-9595

Morton Wealth Management LLC

Greensboro, North Carolina 27408

03/16/2017

This brochure supplement provides information about Jonathan White Stoller 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 Jonathan White Stoller 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:** Jonathan White Stoller      **Born:** 1954

### **Education**

- Arts Center College of Design in Pasadena, CA; BS, Industrial Design; 1980
- Pacific Palisades High, Pacific Palisades, CA; HS Diploma; 1972

### **Business Experience**

- Morton Wealth Management LLC (Formerly Dixon Hughes Wealth Advisors LLC); Independent Investment Advisor Representative; from February 2007 to Present
- Dixon Hughes Wealth Advisors LLC; Independent Investment Advisor Representative; from March 2004 to February 2007
- Transformation and Organization, Inc. (TAO); Owner; from 1980 to Present

### **Designations**

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

- Certified Financial Planner; International Board of Standards and Practices for Certified Financial Planners; 1988

## **Item 3 Disciplinary Information**

Mr. Stoller has no reportable disciplinary history.

## **Item 4 Other Business Activities**

### **Investment-Related Activities**

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

## **Non Investment-Related Activities**

Mr. Stoller works as a personal/business manager with clients in the entertainment industry through Transformation and Organization, Inc. (TAO). In this separate capacity, Mr. Stoller gives advice, guides clients' careers, and provides bookkeeping services. Mr. Stoller receives separate, typical compensation for providing such services. Mr. Stoller may recommend that clients of TAO use our firm's investment management and/or financial planning services. TAO clients are not obligated to use our firm's services but some choose to do so. This creates a potential conflict of interest because there is an incentive for Mr. Stoller to recommend services for which he receives compensation.

Mr. Stoller receives incentive compensation for the recommendation or introduction of potential clients to Morton Wealth Management LLC ("MWM"), in the form of a percentage of the fees paid to MWM for investment supervisory services. Clients are under no obligation to work with MWM.

## **Item 5 Additional Compensation**

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

## **Item 6 Supervision**

Mr. Stoller's activities are supervised by Steven H. Morton, principal of MWM.