

This brochure supplement provides information about David M. Ward that supplements the SWM Advisors brochure. You should have received a copy of that brochure. Please contact Andrea N. Mullins, CCO, if you did not receive SWM Advisors' brochure or if you have any questions about the contents of this supplement.

Additional information about David M. Ward is also available on the SEC's website at www.adviserinfo.sec.gov.

SWM Advisors

Form ADV Part 2B – Individual Disclosure Brochure

for

David Marion Ward

Personal CRD Number: 1577111

Investment Adviser Representative

SWM Advisors
One Beach Drive SE, Suite 301
St. Petersburg, FL 33701
(727) 456-0011
david@swm3.com
www.swm3.com

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Item 2: Educational Background and Business Experience

Name: David Marion Ward

Born: 1960

Educational Background and Professional Designations:

Education:

BS, Business, University of South Florida - 1983

AIF, Accredited Investment Fiduciary - 2019

Business Background:

12/2019 Present	Retirement Plan Advisor, SWM Advisors (Formerly Seabridge Wealth Management, LLC)
05/2017 – 08/2019	Retirement Plan Advisor Montgomery Retirement Plan Advisors
01/2014 – 05/2017	VP Retirement Plan Services Insurance Office of America
11/2004 – 01/2014	Retirement Plan Consultant Insurance Office of America
05/2004 – 11/2004	Retirement Plan Advisor Saunders Financial
04/1999 – 05/2004	Retirement Plan Specialist Hartford Life Insurance Company
05/1995 – 04/1999	National Sales Consultant U.S. Pension Services
08/1991 – 05/1995	Retirement Administrator Eckerd Corporation
01/1987 – 08/1991	Benefits Specialist Coopers & Lybrand

Item 3: Disciplinary Information

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

Item 4: Other Business Activities

David M. Ward is not engaged in any investment-related business or occupation (other than this advisory firm).

Item 5: Additional Compensation

David M. Ward does not receive any economic benefit from any person, company, or organization, other than SWM Advisors in exchange for providing clients advisory services through SWM Advisors.

Item 6: Supervision

As a representative of SWM Advisors, David M. Ward works closely with supervisor Valerie C. DiGennaro, and all advice provided to clients is reviewed by this supervisor prior to implementation. Valerie C. DiGennaro can be reached at (727) 456-0011. David M. Ward adheres to all required regulations regarding the activities of an Investment Adviser Representative and follows all policies and procedures outlined in the firm's policies and procedures manual, including the Code of Ethics, and appropriate securities regulatory requirements.