



## FORM ADV PART 2B: BROCHURE SUPPLEMENT

**Peter Braden, CFP®**

INVESTMENT ADVISOR REPRESENTATIVE

**GODSEY & GIBB WEALTH MANAGEMENT**

6806 Paragon Place, Suite 230  
Richmond, VA 23230

(804) 285-7333

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REVISED 03/22/2024

This Form ADV Part 2B (“Brochure Supplement”) provides information about the background and qualifications of Peter Braden (CRD# 1637922) that supplements the Godsey & Gibb Wealth Management (CRD# 105650) Form ADV Part 2A Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of this Brochure Supplement, please contact us at (804) 285-7333 or [compliance@godseyandgibb.com](mailto:compliance@godseyandgibb.com).

Additional information about Peter Braden is available on the SEC's Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching their full name or individual CRD number.

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**ITEM 2 – EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE****EDUCATION**

University of Richmond, MBA in Business, 1992  
Washington & Lee University, B.A. in Economics, 1986

**BUSINESS EXPERIENCE**

Godsey & Gibb Wealth Management   Wealth Management Advisor	3/2017 to Present
Hatteras Funds   Client Portfolio Manager	5/2015 to 7/2015
Granville Capital, Inc.   Principal	6/2012 to 3/2015
Fiserv   Senior Sales Executive	7/2010 to 5/2012
Braden Consulting, LLC   President	1/2008 to 7/2010
UBS Financial Services   Alternative Investments Consultant	8/2005 to 12/2007
Bank of America   Director, Regional Investments	4/2003 to 4/2005
J.P. Morgan   Vice President	5/2001 to 12/2002
Scott & Stringfellow   Managing Director, Fee Based Programs	12/1998 to 4/2001
Wheat First Union   Senior Vice President	12/1986 to 5/1998

**PROFESSIONAL DESIGNATION(S)**

Peter Braden has earned the following designation(s) and is in good standing with the granting authority:

**CERTIFIED FINANCIAL PLANNER™ PROFESSIONAL**

The program is administered by the Certified Financial Planner Board of Standards Inc. Those with the CFP® designation have demonstrated competency in all areas of finance related to financial planning. Candidates complete studies on over 100 topics, including stocks, bonds, taxes, insurance, retirement planning and estate planning. In addition to passing the CFP® certification exam, candidates must also complete qualifying work experience, agree to adhere to the CFP Board's code of ethics and professional responsibility and financial planning standards and complete 30 hours of continuing education every two years.

**ITEM 3 – DISCIPLINARY INFORMATION**

Peter Braden has no reportable disciplinary history.

**ITEM 4 – OTHER BUSINESS ACTIVITIES**

Peter Braden is not actively engaged in any other investment-related business or occupation and does not receive commissions, bonuses, or other compensation on the sale of securities or other investment products. Peter Braden is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of time.

**ITEM 5 – ADDITIONAL COMPENSATION**

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

**ITEM 6 – SUPERVISION**

Peter Braden is supervised by Michael R. Gibb, President & CEO who can be reached at 804-285-7333. Godsey & Gibb Wealth Management has established policies and procedures for advice given by supervised persons of the firm. Portfolio management is centralized in Godsey & Gibb Wealth Management's corporate office in Richmond, Virginia. The investment committee maintains an approved list of stocks and mutual funds which may be purchased.



## FORM ADV PART 2B: BROCHURE SUPPLEMENT

**Kyle Fischer, CFP®**

INVESTMENT ADVISOR REPRESENTATIVE

**GODSEY & GIBB WEALTH MANAGEMENT**

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This Form ADV Part 2B ("Brochure Supplement") provides information about the background and qualifications of Kyle Fischer (CRD# 6601181) that supplements the Godsey & Gibb Wealth Management (CRD# 105650) Form ADV Part 2A Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of this Brochure Supplement, please contact us at (804) 285-7333 or [compliance@godseyandgibb.com](mailto:compliance@godseyandgibb.com).

Additional information about Kyle Fischer is available on the SEC's Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching their full name or individual CRD number.

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**ITEM 2 – EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE****EDUCATION**

Clemson University, M.S. in Accounting, 2012

Clemson University, B.S. in Accounting, 2011

**BUSINESS EXPERIENCE**

Godsey & Gibb Wealth Management   Wealth Management Advisor	08/2019 to Present
LPL Financial   Wealth Advisor	05/2016 to 11/2017
The Peace Center   Administrative Assistant	10/2015 to 01/2016
Elliot Davis Decosimo, LLC   Auditor	10/2012 to 08/2015

**PROFESSIONAL DESIGNATION(S)**

Kyle Fischer has earned the following designation(s) and is in good standing with the granting authority:

**CERTIFIED FINANCIAL PLANNER™ PROFESSIONAL**

The program is administered by the Certified Financial Planner Board of Standards Inc. Those with the CFP® designation have demonstrated competency in all areas of finance related to financial planning. Candidates complete studies on over 100 topics, including stocks, bonds, taxes, insurance, retirement planning and estate planning. In addition to passing the CFP® certification exam, candidates must also complete qualifying work experience, agree to adhere to the CFP Board's code of ethics and professional responsibility and financial planning standards and complete 30 hours of continuing education every two years.

**ITEM 3 – DISCIPLINARY INFORMATION**

Kyle Fischer has no reportable disciplinary history.

**ITEM 4 – OTHER BUSINESS ACTIVITIES**

Kyle Fischer is not actively engaged in any other investment-related business or occupation and does not receive commissions, bonuses, or other compensation on the sale of securities or other investment products. Kyle Fischer is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of time.

**ITEM 5 – ADDITIONAL COMPENSATION**

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

**ITEM 6 – SUPERVISION**

Kyle Fischer is supervised by Michael R. Gibb, President & CEO who can be reached at 804-285-7333. Godsey & Gibb Wealth Management has established policies and procedures for advice given by supervised persons of the firm. Portfolio management is centralized in Godsey & Gibb Wealth Management's corporate office in Richmond, Virginia. The investment committee maintains an approved list of stocks and mutual funds which may be purchased.



## FORM ADV PART 2B: BROCHURE SUPPLEMENT

**Michael R. Gibb**

INVESTMENT ADVISOR REPRESENTATIVE

**GODSEY & GIBB WEALTH MANAGEMENT**

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This Form ADV Part 2B ("Brochure Supplement") provides information about the background and qualifications of Michael R. Gibb (CRD# 6017943) that supplements the Godsey & Gibb Wealth Management (CRD# 105650) Form ADV Part 2A Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of this Brochure Supplement, please contact us at (804) 285-7333 or [compliance@godseyandgibb.com](mailto:compliance@godseyandgibb.com).

Additional information about Michael R. Gibb is available on the SEC's Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching their full name or individual CRD number.

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**ITEM 2 – EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE****EDUCATION**

Virginia Commonwealth University, B.S. in Economics, 2013

**BUSINESS EXPERIENCE**

Godsey & Gibb Wealth Management   President & CEO	01/2019 to Present
Godsey & Gibb Wealth Management   Vice President	01/2017 to 01/2019
Godsey & Gibb Wealth Management   Portfolio Manager	12/2013 to 12/2016
Godsey and Gibb Wealth Management   Portfolio Management Assistant	09/2010 to 12/2013
Full-Time Education   Student	11/2008 to 09/2010
Godsey & Gibb Wealth Management   Portfolio Management Assistant	02/2006 to 11/2008

**ITEM 3 – DISCIPLINARY INFORMATION**

Michael R. Gibb has no reportable disciplinary history.

**ITEM 4 – OTHER BUSINESS ACTIVITIES**

Michael R. Gibb is not actively engaged in any other investment-related business or occupation and does not receive commissions, bonuses, or other compensation on the sale of securities or other investment products. Michael R. Gibb is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of time.

**ITEM 5 – ADDITIONAL COMPENSATION**

Michael R. Gibb does not receive any economic benefit from a non-advisory client for the provision of advisory services.

**ITEM 6 – SUPERVISION**

Michael R. Gibb is supervised by the Board of Directors who can be reached at 804-285-7333. Godsey & Gibb Wealth Management has established policies and procedures for advice given by supervised persons of the firm. Portfolio management is centralized in Godsey & Gibb Wealth Management's corporate office in Richmond, Virginia. The investment committee maintains an approved list of stocks and mutual funds which may be purchased.



## FORM ADV PART 2B: BROCHURE SUPPLEMENT

**Alexis Houlihan, CFP®**

INVESTMENT ADVISOR REPRESENTATIVE

**GODSEY & GIBB WEALTH MANAGEMENT**

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This Form ADV Part 2B ("Brochure Supplement") provides information about the background and qualifications of Alexis Houlihan (CRD# 6813335) that supplements the Godsey & Gibb Wealth Management (CRD# 105650) Form ADV Part 2A Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of this Brochure Supplement, please contact us at (804) 285-7333 or [compliance@godseyandgibb.com](mailto:compliance@godseyandgibb.com).

Additional information about Alexis Houlihan is available on the SEC's Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching their full name or individual CRD number.

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**ITEM 2 – EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE****EDUCATION**

Virginia Polytechnic Institute & State University, B.S. in Finance, 2017

**BUSINESS EXPERIENCE**

Godsey & Gibb Wealth Management   Financial Planning Advisor	06/2020 to Present
Godsey & Gibb Wealth Management   Portfolio Manager	01/2019 to 06/2020
Godsey & Gibb Wealth Management   Associate Portfolio Manager	11/2017 to 12/2018
Aspect Partners   Financial Analyst	06/2017 to 10/2017

**PROFESSIONAL DESIGNATION(S)**

Alexis Houlihan has earned the following designation(s) and is in good standing with the granting authority:

**CERTIFIED FINANCIAL PLANNER™ PROFESSIONAL**

The program is administered by the Certified Financial Planner Board of Standards Inc. Those with the CFP® designation have demonstrated competency in all areas of finance related to financial planning. Candidates complete studies on over 100 topics, including stocks, bonds, taxes, insurance, retirement planning and estate planning. In addition to passing the CFP® certification exam, candidates must also complete qualifying work experience, agree to adhere to the CFP Board's code of ethics and professional responsibility and financial planning standards and complete 30 hours of continuing education every two years.

**ITEM 3 – DISCIPLINARY INFORMATION**

Alexis Houlihan has no reportable disciplinary history.

**ITEM 4 – OTHER BUSINESS ACTIVITIES**

Alexis Houlihan is not actively engaged in any other investment-related business or occupation and does not receive commissions, bonuses, or other compensation on the sale of securities or other investment products. Kyle Fischer is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of time.

**ITEM 5 – ADDITIONAL COMPENSATION**

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

**ITEM 6 – SUPERVISION**

Alexis Houlihan is supervised by Michael R. Gibb, President & CEO who can be reached at 804-285-7333. Godsey & Gibb Wealth Management has established policies and procedures for advice given by supervised persons of the firm. Portfolio management is centralized in Godsey & Gibb Wealth Management's corporate office in Richmond, Virginia. The investment committee maintains an approved list of stocks and mutual funds which may be purchased.





## FORM ADV PART 2B: BROCHURE SUPPLEMENT

**Jeanmarie McGowan, CFA**

INVESTMENT ADVISOR REPRESENTATIVE

**GODSEY & GIBB WEALTH MANAGEMENT**

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This Form ADV Part 2B ("Brochure Supplement") provides information about the background and qualifications of Jeanmarie McGowan (CRD# 2579481) that supplements the Godsey & Gibb Wealth Management (CRD# 105650) Form ADV Part 2A Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of this Brochure Supplement, please contact us at (804) 285-7333 or [compliance@godseyandgibb.com](mailto:compliance@godseyandgibb.com).

Additional information about Jeanmarie McGowan is available on the SEC's Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching their full name or individual CRD number.

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**ITEM 2 – EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE****EDUCATION**

Virginia Commonwealth University, MBA in Business Administration, 1997

Elon University, B.S. in Business Administration/Finance, 1987

**BUSINESS EXPERIENCE**

Godsey & Gibb Wealth Management   Chief Investment Officer	06/2020 to Present
Godsey & Gibb Wealth Management   Director of Research	02/2014 to 06/2020
Virginia Commonwealth University   Adjunct Professor	01/2011 to 12/2014
Tattersall Advisory Group   Portfolio Specialist	10/2002 to 12/2010
Trigon Services, Inc.   Portfolio Manager	06/1994 to 08/2002

**PROFESSIONAL DESIGNATION(S)**

Jeanmarie McGowan has earned the following designation(s) and is in good standing with the granting authority:

**CHARTERED FINANCIAL ANALYST®**

This designation is offered by the CFA Institute (formerly the Association for Investment Management and Research [AIMR]). To obtain the CFA® charter, candidates must successfully complete three exams and gain at least three (3) years of qualifying work experience, among other requirements. In passing these exams, candidates demonstrate their competence, integrity and extensive knowledge in accounting, ethical and professional standards, economics, portfolio management and security analysis.

**ITEM 3 – DISCIPLINARY INFORMATION**

Jeanmarie McGowan has no reportable disciplinary history.

**ITEM 4 – OTHER BUSINESS ACTIVITIES**

Jeanmarie McGowan is not actively engaged in any other investment-related business or occupation and does not receive commissions, bonuses, or other compensation on the sale of securities or other investment products. Jeanmarie McGowan is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of time.

**ITEM 5 – ADDITIONAL COMPENSATION**

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

**ITEM 6 – SUPERVISION**

Jeanmarie McGowan is supervised by Michael R. Gibb, President & CEO who can be reached at 804-285-7333. Godsey & Gibb Wealth Management has established policies and procedures for advice given by supervised persons of the firm. Portfolio management is centralized in Godsey & Gibb Wealth Management's corporate office in Richmond, Virginia. The investment committee maintains an approved list of stocks and mutual funds which may be purchased.



## FORM ADV PART 2B: BROCHURE SUPPLEMENT

**Kevin Riley**

INVESTMENT ADVISOR REPRESENTATIVE

**GODSEY & GIBB WEALTH MANAGEMENT**

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This Form ADV Part 2B ("Brochure Supplement") provides information about the background and qualifications of Kevin Riley (CRD# 2169482) that supplements the Godsey & Gibb Wealth Management (CRD# 105650) Form ADV Part 2A Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of this Brochure Supplement, please contact us at (804) 285-7333 or [compliance@godseyandgibb.com](mailto:compliance@godseyandgibb.com).

Additional information about Kevin Riley is available on the SEC's Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching their full name or individual CRD number.

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**ITEM 2 – EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE****EDUCATION**

Florida State University, B.S. in Marketing, 1991

**BUSINESS EXPERIENCE**

Godsey & Gibb Wealth Management   Wealth Management Advisor	06/2015 to Present
USAA Wealth Management   Director	12/2013 to 6/2015
Marshwinds Advisory Company   Sr. Vice President	2/2013 to 11/2013
Charles Schwab & Company, Inc.   Vice President and Branch Manager	3/1992 to 8/2012

**ITEM 3 – DISCIPLINARY INFORMATION**

Kevin Riley has no reportable disciplinary history.

**ITEM 4 – OTHER BUSINESS ACTIVITIES**

Kevin Riley is not actively engaged in any other investment-related business or occupation and does not receive commissions, bonuses, or other compensation on the sale of securities or other investment products. Kevin Riley is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of time.

**ITEM 5 – ADDITIONAL COMPENSATION**

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

**ITEM 6 – SUPERVISION**

Kevin Riley is supervised by Michael R. Gibb, President & CEO who can be reached at 804-285-7333. Godsey & Gibb Wealth Management has established policies and procedures for advice given by supervised persons of the firm. Portfolio management is centralized in Godsey & Gibb Wealth Management's corporate office in Richmond, Virginia. The investment committee maintains an approved list of stocks and mutual funds which may be purchased.



## FORM ADV PART 2B: BROCHURE SUPPLEMENT

**Danny L. Savage**

INVESTMENT ADVISOR REPRESENTATIVE

**GODSEY & GIBB WEALTH MANAGEMENT**

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This Form ADV Part 2B ("Brochure Supplement") provides information about the background and qualifications of Danny L. Savage (CRD# 2232727) that supplements the Godsey & Gibb Wealth Management (CRD# 105650) Form ADV Part 2A Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of this Brochure Supplement, please contact us at (804) 285-7333 or [compliance@godseyandgibb.com](mailto:compliance@godseyandgibb.com).

Additional information about Danny L. Savage is available on the SEC's Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching their full name or individual CRD number.

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**ITEM 2 – EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE****EDUCATION**

Indiana University in Bloomington, B.S. in Social Sciences, 1992

**BUSINESS EXPERIENCE**

Godsey & Gibb Wealth Management | Managing Director  
Charles Schwab & Co., Inc | Branch Manager

02/2006 to Present  
01/1992 to 01/2006

**ITEM 3 – DISCIPLINARY INFORMATION**

Danny Savage has no reportable disciplinary history.

**ITEM 4 – OTHER BUSINESS ACTIVITIES**

Danny Savage is not actively engaged in any other investment-related business or occupation and does not receive commissions, bonuses, or other compensation on the sale of securities or other investment products. Danny Savage is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of time.

**ITEM 5 – ADDITIONAL COMPENSATION**

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

**ITEM 6 – SUPERVISION**

Danny Savage is supervised by Michael R. Gibb, President & CEO who can be reached at 804-285-7333. Godsey & Gibb Wealth Management has established policies and procedures for advice given by supervised persons of the firm. Portfolio management is centralized in Godsey & Gibb Wealth Management's corporate office in Richmond, Virginia. The investment committee maintains an approved list of stocks and mutual funds which may be purchased.



## FORM ADV PART 2B: BROCHURE SUPPLEMENT

# Ephraim Ulmer

## INVESTMENT ADVISOR REPRESENTATIVE

### GODSEY & GIBB WEALTH MANAGEMENT

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This Form ADV Part 2B ("Brochure Supplement") provides information about the background and qualifications of Ephraim Ulmer (CRD# 822497) that supplements the Godsey & Gibb Wealth Management (CRD# 105650) Form ADV Part 2A Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of this Brochure Supplement, please contact us at (804) 285-7333 or [compliance@godseyandgibb.com](mailto:compliance@godseyandgibb.com).

Additional information about Ephraim Ulmer is available on the SEC's Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching their full name or individual CRD number.

**ITEM 2 – EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE****EDUCATION**

University of South Carolina, J.D., 1973

The Citadel, B.A. in Business Administration, 1969

**BUSINESS EXPERIENCE**

Godsey & Gibb Wealth Management | Vice President/Secretary

09/1998 to Present

Godsey & Gibb Wealth Management | Vice President

09/1991 to 09/1998

**ITEM 3 – DISCIPLINARY INFORMATION**

Ephraim Ulmer has no reportable disciplinary history.

**ITEM 4 – OTHER BUSINESS ACTIVITIES**

Ephraim Ulmer is not actively engaged in any other investment-related business or occupation and does not receive commissions, bonuses, or other compensation on the sale of securities or other investment products. Ephraim Ulmer is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of time.

**ITEM 5 – ADDITIONAL COMPENSATION**

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

**ITEM 6 – SUPERVISION**

Ephraim Ulmer is supervised by Michael R. Gibb, President & CEO who can be reached at 804-285-7333. Godsey & Gibb Wealth Management has established policies and procedures for advice given by supervised persons of the firm. Portfolio management is centralized in Godsey & Gibb Wealth Management's corporate office in Richmond, Virginia. The investment committee maintains an approved list of stocks and mutual funds which may be purchased.





## FORM ADV PART 2B: BROCHURE SUPPLEMENT

**Marc A. Verdi, CPA/PFS, CFP®**

INVESTMENT ADVISOR REPRESENTATIVE

**GODSEY & GIBB WEALTH MANAGEMENT**

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This Form ADV Part 2B ("Brochure Supplement") provides information about the background and qualifications of Marc A. Verdi (CRD# 5485381) that supplements the Godsey & Gibb Wealth Management (CRD# 105650) Form ADV Part 2A Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of this Brochure Supplement, please contact us at (804) 285-7333 or [compliance@godseyandgibb.com](mailto:compliance@godseyandgibb.com).

Additional information about Marc A. Verdi is available on the SEC's Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching their full name or individual CRD number.

## ITEM 2 – EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

### EDUCATION

University of Virginia, M.S. in Accounting, 1998  
University of Virginia, B.S. in Commerce and Accounting, 1997

### BUSINESS EXPERIENCE

Godsey & Gibb   Tax & Financial Planning Director and Chief Financial Officer	08/2013 to Present
Well Coleman & Company   Tax Manager	06/2012 to 07/2013
Marc A Verdi, LLC   Owner	03/2012 to 06/2012
Morgan Stanley Smith Barney   Personal Banker	08/2009 to 03/2012
CB&H Wealth Management Services, LLC   Investment Advisor	01/2009 to 07/2009
Cherry, Bekaert & Holland, LLP   Manager	12/2007 to 07/2009
Keiter Stephens Hurst Gary & Shreaves, PC   Senior Tax Associate	09/2004 to 12/2007
Ernst & Young, LLP   Audit Senior	07/2002 to 08/2004
Insmed, Inc.   Assistant Controller	07/2000 to 07/2002
Ernst & Young, LLP   Staff Auditor	10/1998 to 07/2000

### PROFESSIONAL DESIGNATION(S)

Marc Verdi has earned the following designation(s) and is in good standing with the granting authority:

#### CERTIFIED PUBLIC ACCOUNTANT (CPA)

In order to become a CPA in the United States, the candidate must sit for and pass the Uniform Certified Public Accountant Examination, which is set by the American Institute of Certified Public Accountants and administered by the National Association of State Boards of Accountancy. Eligibility to sit for the Uniform CPA Exam is determined by individual State Boards of Accountancy. Typically, the requirement is a U.S. bachelor's degree which includes a minimum number of qualifying credit hours in accounting and business administration with an additional 1 year study. All CPA candidates must pass the Uniform CPA Examination to qualify for a CPA certificate and license (i.e., permit to practice) to practice public accounting. CPAs are required to take continuing education courses in order to renew their license. Requirements vary by state. The vast majority of states require 120 hours of CPE every 3 years with a minimum of 20 hours per calendar year. The requirement can be fulfilled through attending live seminars, webcast seminars, or through self-study (textbooks, videos, online courses, all of which require a test to receive credit). As part of the CPE requirement, most states require their CPAs to take an ethics course during every renewal period. Ethics requirements vary by state, and the courses range from 2 to 8 hours.

#### CERTIFIED FINANCIAL PLANNER™ PROFESSIONAL

The program is administered by the Certified Financial Planner Board of Standards Inc. Those with the CFP® designation have demonstrated competency in all areas of finance related to financial planning. Candidates complete studies on over 100 topics, including stocks, bonds, taxes, insurance, retirement planning and estate planning. In addition to passing the CFP® certification exam, candidates must also complete qualifying work experience, agree to adhere to the CFP Board's code of ethics and professional responsibility and financial planning standards and complete 30 hours of continuing education every two years.

#### PERSONAL FINANCIAL SPECIALIST

The PFS designation is awarded by the American Institute of Certified Public Accountants (AICPA) to those who have taken additional training and already have a CFP® designation. Every PFS credential holder is a licensed CPA and a member in good standing in the AICPA; has met strict education and eligible business experience requirements, including two (2) years of full time business or teaching experience in personal financial planning and has agreed to the AICPA Code of Professional Conduct.

## ITEM 3 – DISCIPLINARY INFORMATION

Marc Verdi has no reportable disciplinary history.

#### **ITEM 4 – OTHER BUSINESS ACTIVITIES**

Marc Verdi is not actively engaged in any other investment-related business or occupation and does not receive commissions, bonuses, or other compensation on the sale of securities or other investment products. Marc Verdi is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of time.

#### **ITEM 5 – ADDITIONAL COMPENSATION**

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

#### **ITEM 6 – SUPERVISION**

Marc Verdi is supervised by Michael R. Gibb, President & CEO who can be reached at 804-285-7333. Godsey & Gibb Wealth Management has established policies and procedures for advice given by supervised persons of the firm. Portfolio management is centralized in Godsey & Gibb Wealth Management's corporate office in Richmond, Virginia. The investment committee maintains an approved list of stocks and mutual funds which may be purchased.