

John S. Morgan, AIF[®], APMA[®]

Mountain View Strategic Wealth, LLC



**200 North Drive
i.Park Suite 103
Hopewell Junction, NY 12533**

**Telephone: (845) 834-4343
and (914) 281-3495
Facsimile: (845) 834-4344**

March 31, 2022

**FORM ADV PART 2B
BROCHURE**

This brochure supplement provides information about John S. Morgan, AIF[®], APMA[®] that supplements the Mountain View Strategic Wealth, LLC brochure. You should have received a copy of that brochure. Contact us at 845-834-4343 if you did not receive Mountain View Strategic Wealth, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about John S. Morgan, AIF[®], APMA[®] (CRD# 2030826) is available on the SEC's website at www.adviserinfo.sec.gov. You can search this site by a unique identifying number, known as the CRD number listed above.

Item 2 Educational Background and Business Experience

John S. Morgan, AIF®, APMA®

Year of Birth: 1964

Post-Secondary Education:

- Union College, Bachelor of Science, Industrial Economics, 1993
- Series 65
- Life and Health Insurance License
- John S. Morgan holds the professional designation of Accredited Portfolio Management AdvisorSM (APMA®)

The College for Financial Planning awards the APMA® designation to individuals who have completed a course of study encompassing client assessments and suitability, risk/return investment objectives, bond and equity portfolios, modern portfolio theory and investor psychology. Students have hands-on practice in analyzing investment policy statements, building portfolios, and making asset allocation decisions including sell, hold and buy decisions within a client's portfolio. The program is designed for 80-100 hours of self-study. The program is self-paced and must be completed within one year of enrollment. For additional information about this credential, please refer to the website of the issuing organization.

- John S. Morgan holds the professional designation of Accredited Investment Fiduciary® (AIF®)
The AIF® designation certifies that the recipient has specialized knowledge of fiduciary standards of care and their application to the investment management process. The certification is administered by the Center for Fiduciary Studies, LLC (a Fiduciary360 company). AIF® designation requirements are: Complete a training program; Pass a comprehensive, closed-book final examination under the supervision of a proctor, agree to abide by the AIF® Code of Ethics; Complete six hours of continuing education credits every year; Renew, on an annual basis, affirmation of the AIF® Code of Ethics.

Business Background:

- Mountain View Strategic Wealth, LLC, President, Chief Investment Officer, 6/2018 to Present
- Sowell Management Services, Investment Advisor Representative, 6/2018 to 11/2021
- Marshall & Sterling Wealth Advisors, Inc., Vice President & CCO, 4/2012 to 5/2018
- Navigator Money Management, Inc., Vice President, 7/2005 to 2/2012

Item 3 Disciplinary Information

Form ADV Part 2B requires disclosure of certain criminal or civil actions, administrative proceedings, and self-regulatory organization proceedings, as well as certain other proceedings related to suspension or revocation of a professional attainment, designation, or license. Mr. Morgan has no history of any legal or disciplinary events.

Item 4 Other Business Activities

John S. Morgan is an insurance agent and in this capacity John S. Morgan may recommend insurance, advisory, or other products, and receive commissions and other compensation if products are purchased through any firms with which John S. Morgan is affiliated. Thus, a potential conflict of interest may exist between the interests of John S. Morgan and those of the advisory clients. However, clients are under no obligation to act upon any recommendations of John S. Morgan or effect any transactions through John S. Morgan if they decide to follow the recommendations.

Item 4 Other Business Activities Continued

In addition to being an Investment Advisor Representative of Mountain View Strategic Wealth, LLC, John S. Morgan owns Mountain View Strategic Wealth, LLC, a New York Registered Investment Advisory Firm.

John S. Morgan serves as a volunteer Board of Education Trustee of the Wappingers Central School District; Board of Education meetings are generally held in the evening, outside of securities trading hours.

Item 5 Additional Compensation

None other than what is stated in Item 4.

Item 6 Supervision

John S. Morgan is the sole owner, President, Chief Investment Officer and Chief Compliance Officer of Mountain View Strategic Wealth, LLC, and is generally responsible for his own supervision. John S. Morgan monitors his advice in an effort to ensure that investments are suitable for his individual clients and consistent with their individual needs, goals, objectives, time horizon, and risk tolerance, as well as any restrictions requested by Mountain View Strategic Wealth's clients. John Morgan can be reached at (845) 834-4343.

Item 7 Requirements for State Registered Advisers

Mr. Morgan does not have any reportable arbitration claims, has not been found liable in a reportable civil, self-regulatory organization or administrative proceeding, and has not been the subject of a bankruptcy petition.