

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

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Morton Wealth Management LLC

Greensboro, North Carolina 27408

3/31/2013

This brochure supplement provides information about Steven Hendrie Morton that supplements the Morton Wealth Management LLC brochure. You should have received a copy of that brochure. Please contact Jeanne Rabe 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 Steven Hendrie Morton 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:** Steven Hendrie Morton      **Born:** 1953

### **Education**

- University of Denver; BSBA, Accounting; 1974
- Westside High School, Omaha, Nebraska; HS Diploma; 1971

### **Business Experience**

- Morton Wealth Management LLC (formerly Dixon Hughes Wealth Advisors LLC); Owner/Manager; from February 2007 to Present
- Dixon Hughes Wealth Advisors LLC; Owner/Manager; from March 2004 to February 2007

### **Designations**

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

- Certified Public Accountant (CPA); Colorado Society of CPAs; 1975
- Certified Financial Planner (CFP); International Board of Standards and Practices for Certified Financial Planners; 1981

## **Item 3 Disciplinary Information**

Mr. Morton has no reportable disciplinary history.

## **Item 4 Other Business Activities**

### **Investment-Related Activities**

Mr. Morton, a principal of Morton Wealth Management, is an independent insurance agent. Mr. Morton may sell insurance products to clients who wish to implement such transactions. Morton Wealth Management LLC may receive separate, typical compensation in the form of insurance commissions for providing such services. This creates a potential conflict of interest because there is an incentive for him to recommend services for which he receives compensation. Clients are not obligated to follow the recommendations of Mr. Morton or implement the recommendations through him if they decide to follow the recommendations.

## **Non Investment-Related Activities**

Mr. Morton is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of his time.

## **Item 5 Additional Compensation**

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

## **Item 6 Supervision**

Mr. Morton is a member of the management team which is responsible for the supervision of and formulation of financial planning and investment advice offered to clients. The management team documents and oversees investment committee meetings and all material investment policy changes.