

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

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Greensboro, North Carolina 27408

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This brochure supplement provides information about Jeanne Marie Rabe 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 Jeanne Marie Rabe 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:** Jeanne Marie Rabe      **Born:** 1961

### **Education**

- Eastern Michigan University; MBA; 1990
- Bowling Green State University; BSBA, Accounting; 1982
- Napoleon High School, Napoleon, Ohio; HS Diploma; 1979

### **Business Experience**

- Morton Wealth Management LLC (formerly Dixon Hughes Wealth Advisors LLC); Financial Advisor/Practice Manager/Chief Compliance Officer; from September 2007 to Present
- Douglas Gross/Raymond James Financial Services; Financial Advisor; from August 2003 to September 2007
- Dixon Odom Financial Advisors LLC; Financial Advisor; from January 2000 to July 2003

### **Designations**

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

- Certified Public Accountant (CPA); Accountancy Board of Ohio; 1984
- Certified Financial Planner (CFP); International Board of Standards and Practices for Certified Financial Planners; 1990
- Chartered Financial Analyst (CFA); CFA Institute; 2012

## **Item 3 Disciplinary Information**

Ms. Rabe has no reportable disciplinary history.

## **Item 4 Other Business Activities**

### **Investment-Related Activities**

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

### **Non Investment-Related Activities**

Ms. Rabe is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of her time.

### **Item 5 Additional Compensation**

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

### **Item 6 Supervision**

Ms. Rabe 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.