

**Form ADV Part 2B - Brochure Supplement**  
**Item 1: Cover Page**  
**January 2015**

**Jeffrey M. Burgess**

**Burgess Wealth Advisory**  
**9020 Stony Point Pkwy, Suite 360**  
**Richmond, VA 23235**

This brochure supplement provides information about Mr. Burgess that supplements our brochure. You should have received a copy of that brochure. Please contact Jeffrey Burgess, Chief Compliance Officer if you did not receive Burgess Wealth Advisory's brochure or if you have any questions about the contents of this supplement.

Additional information about Mr. Burgess is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2: Educational Background & Business Experience

**Jeffrey M. Burgess**

**Year of Birth:** 1971

### **Educational Background:**

- 1993; Connecticut College; B.S. Religious Studies and Physics

### **Business Background:**

- 01/2015 – Present JM Burgess Corp doing business as Burgess Wealth Advisory; Chief Compliance Officer and Investment Adviser Representative
- 01/2014 – Present JM Burgess Corp.; President
- 05/1997 – 01/2015 Ameriprise Financial Services, Inc.; Financial Advisor

### **Exams, Licenses & Other Professional Designations:**

- 06/1998 – Series 63
- 06/1998 – Series 65
- 01/1998 – Series 7
- Chartered Retirement Planning Counselor

### **CRPC - Chartered Retirement Planning Counselor:**

Mr. Burgess has a professional designation, Chartered Retirement Planning Counselor (CRPC). The CRPC is offered by The College for Financial Planning®. The CRPC Program focuses on the pre- and post-retirement needs of individuals. Enrollment in the program guides you through the retirement process, addressing issues such as estate planning and asset management. The College for Financial Planning® awards the Chartered Retirement Planning CounselorSM and CRPC® designation to students who: successfully complete the program; pass the final examination; and comply with the Code of Ethics, which includes agreeing to abide by the Standards of Professional Conduct promulgated by The College for Financial Planning®.

Applicants must also disclose of any criminal, civil, self-regulatory organization, or governmental agency inquiry, investigation, or proceeding relating to their professional or business conduct. Conferment of the designation is contingent upon the College for Financial Planning's review of matters either self-disclosed or which are discovered by the College that are required to be disclosed.

Successful students receive a certificate and are granted the right to use the designation on correspondence and business cards for a two-year period.

Continued use of the CRPC® designation is subject to ongoing renewal requirements. Every two years individuals must renew their right to continue using the CRPC® designation by: completing 16 hours of continuing education and reaffirming to abide by the Standards of Professional Conduct, Terms and Conditions, and self-disclose any criminal, civil, self-regulatory organization, or governmental agency inquiry, investigation, or proceeding relating to their professional or business conduct.

### **Item 3: Disciplinary Information**

There are no legal or disciplinary events that are material to the evaluation of Mr. Burgess.

### **Item 4: Other Business Activities**

Mr. Burgess is a partner in KDB Partners, LLC. The Limited Liability Company was established amongst the partners for office sharing expenses only. This activity does not present a conflict of interest for clients of our firm. Mr. Burgess spends approximately 1 to 9 hours a month on this activity.

### **Item 5: Additional Compensation**

Mr. Burgess does not receive any other economic benefit for providing advisory services in addition to advisory fees.

### **Item 6: Supervision**

Mr. Burgess is the sole principal and Chief Compliance Officer and as such has no internal supervision placed over him. He is, however, bound by our firm's Code of Ethics.