

*This brochure supplement provides information about Blake Alexander Morlet that supplements the BDT & Associates, Inc. brochure. You should have received a copy of that brochure. Please contact Blake Alexander Morlet if you did not receive BDT & Associates, Inc.'s brochure or if you have any questions about the contents of this supplement.*

*Additional information about Blake Alexander Morlet is also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).*

## **BDT & Associates, Inc.**

d/b/a Invicta Financial Group

### **Form ADV Part 2B – Individual Disclosure Brochure**

*for*

### **Blake Alexander Morlet**

Personal CRD Number: 6915226

Investment Adviser Representative

BDT & Associates, Inc.  
11440 West Bernardo Court Suite 300  
San Diego, CA 92127  
(858) 753-1728  
[blake@invictafg.com](mailto:blake@invictafg.com)

UPDATED: 12/26/2018

## **Item 2: Educational Background and Business Experience**

**Name:** Blake Alexander Morlet

**Born:** 1988

### **Educational Background and Professional Designations:**

#### **Education:**

Organizational Leadership Business Management, Chapman University - 2010

#### **Business Background:**

02/2018 - Present	Investment Adviser Representative BDT & Associates, Inc.
09/2012 – 03/2018	Senior Manager Avalon Management Group
03/2006 - 09/2012	Manager Starsurplus.com

## **Item 3: Disciplinary Information**

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

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

Blake Alexander Morlet is a real estate broker or dealer. From time to time, he will offer clients advice or products from this activity. Clients should be aware that these services pay a commission and involve a possible conflict of interest, as commissionable products can conflict with the fiduciary duties of a registered investment adviser. BDT & Associates, Inc. always acts in the best interest of the client; including in the sale of commissionable products to advisory clients. Clients are in no way required to implement the plan through any representative of BDT & Associates, Inc. in their capacity as a real estate dealer or broker.

Blake Alexander Morlet is a licensed insurance agent with Blake A Morlet, Sole Proprietor since March 2018. He sells and services health and life insurance. From time to time, he will offer clients advice or products from this activity. Clients should be aware that these services pay a commission and involve a possible conflict of interest, as commissionable products can conflict with the fiduciary duties of a registered investment adviser. BDT & Associates, Inc. always acts in the best interest of the client; including in the sale of commissionable products to advisory clients. Clients are in no way required to implement the plan through any representative of BDT & Associates, Inc. in their capacity as a licensed insurance agent. He received approximately \$12,000 a year in compensation and spends 12-18 hours per month on this activity.

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

Blake Alexander Morlet does not receive any economic benefit from any person, company, or organization, other than BDT & Associates, Inc. in exchange for providing clients advisory services through BDT & Associates, Inc..

### **Item 6: Supervision**

As a representative of BDT & Associates, Inc., Blake Alexander Morlet is supervised by Kimberly K. Davis, the firm's Chief Compliance Officer. Kimberly K. Davis is responsible for ensuring that Blake Alexander Morlet adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Kimberly K. Davis is (928) 344-8000.

### **Item 7: Requirements For State Registered Advisers**

*This disclosure is required by state securities authorities and is provided for your use in evaluating this investment advisor representative's suitability.*

- A. Blake Alexander Morlet has not been involved in any of the events listed below.
1. An award or otherwise being found liable in an arbitration claim alleging damages in excess of \$2,500, involving any of the following:
    - a) an investment or an investment-related business or activity;
    - b) fraud, false statement(s), or omissions;
    - c) theft, embezzlement, or other wrongful taking of property;
    - d) bribery, forgery, counterfeiting, or extortion; or

- e) dishonest, unfair, or unethical practices.
2. An award or otherwise being found liable in a civil, self-regulatory organization, or administrative proceeding involving any of the following:
- a) an investment or an investment-related business or activity;
  - b) fraud, false statement(s), or omissions;
  - c) theft, embezzlement, or other wrongful taking of property;
  - d) bribery, forgery, counterfeiting, or extortion; or
  - e) dishonest, unfair, or unethical practices.
- B. Blake Alexander Morlet has not been the subject of a bankruptcy petition.