

This brochure supplement provides information about Michele Herzberg that supplements the BWM Advisory LLC brochure. You should have received a copy of that brochure. Please contact Michele Herzberg if you did not receive BWM Advisory LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Michele Herzberg is also available on the SEC's website at www.adviserinfo.sec.gov.

BWM Advisory LLC

Form ADV Part 2B – Individual Disclosure Brochure

for

Michele Herzberg

Personal CRD Number: 2210431

Investment Adviser Representative

BWM Advisory LLC

7621 E Gray Rd Suite C

Scottsdale, AZ 85260

1-800-779-4183

michele@bedrockia.com

UPDATED: 08/20/2020

Michele Herzberg is not licensed to act as an investment adviser representative in the State of New York.

Item 2: Educational Background and Business Experience

Name: Michele Herzberg

Born: 1963

Educational Background and Professional Designations:

Education:

8/82 – 5/83

Drake University – Des Moines Iowa

8/83 – 5/86

Arizona State University – Tempe Arizona

Business Background:

06/2020 - Present

Investment Adviser Representative & Compliance
Associate
BWM Advisory LLC

08/2019 – 06/2020

Compliance Associate
Bedrock Financial Services

07/2018 - 06/2019

Investment Adviser Representative
USAA Investment Management Company / USAA
Financial Advisors Inc. / APEX

11/2016 - 03/2018

Registered Sales Assistant
Lucia Capital Group

06/2016 - 11/2016

Unemployed
Unemployed

01/2016 - 06/2016

Back Office
United Planners Financial Services

11/2013 - 09/2015

Client Relationship Consultant
Merrill Edge

03/2013 - 11/2013

Unemployed
Unemployed

01/1998 - 03/2013

Senior Client Services Specialist & Business
Development
Charles Schwab

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

Michele Herzberg is not engaged in any investment-related business or occupation (other than this advisory firm).

Item 5: Additional Compensation

Michele Herzberg does not receive any economic benefit from any person, company, or organization, other than BWM Advisory LLC in exchange for providing clients advisory services through BWM Advisory LLC.

Item 6: Supervision

As a representative of BWM Advisory LLC, Michele Herzberg is supervised by Jeffrey Boettcher, the firm's Chief Compliance Officer. Jeffrey Boettcher is responsible for ensuring that Michele Herzberg 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 Jeffrey Boettcher is (800) 779-4813.

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. Michele Herzberg 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. Michele Herzberg has NOT been the subject of a bankruptcy.