

**Item 1: Cover Page
Part 2B of Form ADV: Brochure Supplement
February 2021**



Kenneth Lynn Templeton II

**Ulta Wealth Management, LLC
3311 South Rainbow Blvd., Suite 203
Las Vegas, NV 89146
www.ultawealth.com**

**Firm Contact:
Kenneth Lynn Templeton II
Chief Compliance Officer**

This brochure supplement provides information about Mr. Templeton that supplements our brochure. You should have received a copy of that brochure. Please contact Mr. Templeton if you did not receive Ulta Wealth Management, LLC's brochure or if you have any questions about the contents of this supplement. Additional information about Mr. Templeton is available on the SEC's website at www.adviserinfo.sec.gov by searching CRD #5839612.

Item 2: Educational Background & Business Experience

Kenneth Lynn Templeton II
Year of Birth: 1984

Educational Background:

- 2009: University of Nevada, Reno; Bachelor of Science in Finance

Business Background:

- 01/2021 – Present Ulta Wealth Management, LLC; Managing Member & Chief Compliance Officer
- 03/2011 – 01/2021 Morgan Stanley; Investment Advisor Representative
- 12/2010 – 11/2020 Morgan Stanley; Registered Representative

Exams, Licenses & Other Professional Designations:

- 03/2011: Series 66 Exam
- 12/2010: Series 7 Exam

Item 3: Disciplinary Information¹

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

Item 4: Other Business Activities

Mr. Templeton does not have any outside business activities to report.

Item 5: Additional Compensation

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

¹ Note: Our firm may, under certain circumstances, rebut the presumption that a disciplinary event is material. If an event is immaterial, we are not required to disclose it. When we review a legal or disciplinary event involving the advisor to determine whether it is appropriate to rebut the presumption of materiality, we consider all of the following factors: (1) the proximity of advisor to the advisory function; (2) the nature of the infraction that led to the disciplinary event; (3) the severity of the disciplinary sanction; and (4) the time elapsed since the date of the disciplinary event. If we conclude that the materiality presumption has been overcome, we prepare and maintain a file memorandum of our determination in our records. We follow SEC rule 204-2(a)(14)(iii) and similar state rules.

Item 6: Supervision

Mr. Templeton is the sole owner 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.

Item 7: Requirements for State-Registered Advisers

Mr. Templeton has not been involved in any arbitration claim alleging damages in excess of \$2,500. Furthermore, he has neither been involved in nor found liable in any civil, self-regulatory organization, or administrative proceeding nor has been the subject of any bankruptcy petitions.