

This brochure supplement provides information about Jeffrey S Boettcher that supplements the BWM Advisory LLC brochure. You should have received a copy of that brochure. Please contact Jeffrey S Boettcher 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 Jeffrey S Boettcher is also available on the SEC's website at www.adviserinfo.sec.gov.

BWM Advisory LLC

Form ADV Part 2B – Individual Disclosure Brochure

for

Jeffrey S Boettcher

Personal CRD Number: 4001659

Investment Adviser Representative

BWM Advisory LLC
7621 E. Gray Road, Suite C
Scottsdale, AZ 85258
(800) 779-4183
jeff@bedrockia.com

UPDATED: 12/01/2020

Item 2: Educational Background and Business Experience

Name: Jeffrey S Boettcher **Born:** 1974

Educational Background and Professional Designations:

Education:

BA Business, Miami University - 1998

Business Background:

10/2014 - Present	President Investment Adviser Representative BWM Advisory LLC
02/2010 - Present	President Bedrock Investment Advisors previously BWM Advisory LLC
02/2012 - Present	Buyer/Renter Jeff Boettcher - Rental Property

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

Jeffrey S Boettcher is a licensed insurance agent. 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. BWM Advisory LLC 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 utilize the services any representative of BWM Advisory LLC in such individual's outside capacity. Less than 10 hours a month are spent on this activity. The adviser

owes the client a fiduciary duty to put the Client's interest first which includes, but is not limited to, a duty of care, loyalty, obedience, and utmost good faith.

Jeffrey S Boettcher is the President of the Insurance Marketing Firm (Bedrock Financial Services).

Jeffrey S Boettcher is a rental property owner.

Item 5: Additional Compensation

Jeffrey S Boettcher 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, and CCO Jeffery Boettcher supervises all activities of the firm. Jeffery Boettcher's contact information is on the cover page of this disclosure document. Jeffery Boettcher adheres to applicable regulatory requirements, together with all policies and procedures outlined in the firm's code of ethics and compliance manual.

Item 7: Requirements For State Registered Advisers

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

A. Jeffrey S Boettcher 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. Jeffrey S Boettcher has been the subject of a bankruptcy petition:
Chapter 7 filed on 03/01/2010, Discharged on 07/01/2010