

Registered As: Virtus Wealth Management, LLC | CRD No. 317832



Form ADV Part 2B – Individual Disclosure Brochure

**Josie K. Metzger**

CRD No: 7630529

**Supervised from:**

9378 Olive Blvd, Suite 102  
Olivette, MO 63132  
(314) 395-6133

**Located at:**

807 E Washington Street  
Bloomington, IL 61701  
(309) 473-9991

Website: <http://www.thevirtusfg.com/>

**September 08, 2022**

This brochure supplement provides information about your Investment Advisor Representative that supplements the firm disclosure brochure. You should have received a copy of the firm brochure that describes the investment advisory services offered through Virtus Wealth Management a registered investment advisor. Please contact Virtus Wealth Management at the telephone number above if you did not receive their brochure or if you have any questions about the contents of this supplement. Additional information about your Investment Advisor Representative is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

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## Item 2 - Educational Background and Business Experience

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This section of the brochure supplement includes the supervised person's name, age (or year of birth), formal education after high school, and business background (including an identification of the specific positions held) for the preceding five years.

Name: **Josie K. Metzger**

Year of birth: **1999**

### Education

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The following information details your Financial Advisor's formal education. If a degree was attained, the type of the degree will be listed next to the name of the institution. If a degree is not listed, the Financial Advisor attended the institution but did not attain a degree.

Illinois State University – B.S. Finance & Economics (2022)

### Business Experience

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The following information details your Financial Advisor's business experience for at least the past 5 years.

Virtus Wealth Management – Financial Advisor  
09/2022 – Present

Virtus Wealth Management – Service Advisor  
05/2022 – Present

Bloomington Country Club – Server  
06/2021 – 07/2022

Luhr Bros, Inc – Summer Helper  
05/2019 – 07/2020

Student – Student  
08/2006 – 05/2022

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## Item 3 - Disciplinary Information

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This section includes any legal or disciplinary events and material to a client's or prospective client's evaluation of the supervised person.

There are no legal or disciplinary events required to be disclosed in response to this item. Any such disciplinary information would be available at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

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#### **Item 4 - Other Business Activities**

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This section includes any relationship between the advisory business and the supervised person's other financial industry activities that creates a material conflict of interest with clients and describes the nature of the conflict and generally how it is addressed. If the supervised person is actively engaged in any investment-related business or occupation, including if the supervised person is registered, or has an application pending to register, as a broker-dealer, registered representative of a broker-dealer, futures commission merchant ("FCM"), commodity pool operator ("CPO"), commodity trading advisor ("CTA"), or an associated person of an FCM, CPO, or CTA, the business relationship, if any, between the advisory business and the other business is disclosed below.

##### licensed Insurance Agent

Ms. Metzger is a licensed insurance agent with various insurance companies. In this capacity, Andrew may recommend your purchase of certain insurance products such as term life and fixed annuities.

##### Conflict of Interest

Clients should be aware that as a licensed insurance agent, Ms. Metzger will receive a share in the commissions paid for the sale of insurance products you purchase through her. She can also receive additional compensation or incentives through an insurance marketing organization which is also based on the sale of insurance products. Receipt of such transaction-based compensation creates a conflict of interest as it provides an incentive for Ms. Metzger to recommend insurance products based on the compensation received. Clients are under no obligation to engage Ms. Metzger for insurance services.

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#### **Item 5 - Additional Compensation**

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This section includes details regarding if someone who is not a client provides an economic benefit to the supervised person for providing advisory services. For purposes of this Item, economic benefits include sales awards and other prizes, but not the supervised person's regular salary, if any.

Ms. Metzger can receive economic benefits based on production such as awards, incentive travel expenses, attendance at conferences, dinners or other entertainment events as well as promotional gifts.

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#### **Item 6 – Supervision**

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This section explains how Virtus Wealth Management supervises the supervised person, including how the advice the supervised person provided to clients is monitored.

Virtus Wealth Management maintains a supervisory structure and system reasonably designed to prevent violations of applicable state rules and regulations. Andrew Hall serves as the Chief Compliance Officer and is responsible for administering the policies and procedures and a system of technology-based controls to monitor account activity for irregularities or patterns that require review and potential action that may lead to disciplinary action or reimbursements.

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## Item 7 – Requirements for State Registered Advisors

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In addition to the events listed in Item 3 of Part 2B, if the supervised person has been involved in one of the events listed below, disclose all material facts regarding the event. 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.

- None

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.

If the *supervised person* has been the subject of a bankruptcy petition, disclose that fact, the date the petition was first brought, and the current status.

- Josie Metzger has not been involved in any of the above listed events or the subject of a bankruptcy petition.