

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:

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Bloomington, IL 61701
(309) 473-9991

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This Form ADV 2B (“Brochure Supplement”) provides information about your Investment Advisor Representative that supplements the Virtus Wealth Management, LLC dba Virtus Financial Group Disclosure Brochure. You should have received a copy of the Virtus Wealth Disclosure Brochure that describes the investment advisory services offered through Virtus Wealth, a registered investment advisor. Please contact Virtus Wealth at the telephone number above if you did not receive this Disclosure Brochure or if you have any questions about the contents of this Brochure Supplement. Additional information about your Investment Advisor Representative (Investment Advisor Representative) is available on the SEC’s website at www.adviserinfo.sec.gov.

Item 2 - Educational Background and Business Experience

This section of the Brochure Supplement includes the Investment Advisor Representative'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, Investment Advisor Representative**

Year of birth: **1999**

Education

The following information details your Investment Advisor Representative'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

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

Virtus Wealth Management, LLC – Investment Advisor Representative
09/2022 – Present

Virtus Wealth Management, LLC – Service Consultant
05/2022 – Present

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

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

Student – Student
08/2005 – 05/2022

Item 3 - Disciplinary Information

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

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.

Item 4 - Other Business Activities

This section includes any relationship between the advisory business and the Investment Advisor Representative'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 Investment Advisor Representative is actively engaged in any investment-related business or occupation, including if the Investment Advisor Representative 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, Josie may recommend your purchase of certain insurance products such as term life and fixed annuities.

Wrezinski Advisory Group

Ms. Metzger is employed by Wrezinski Advisory Group. In this capacity, Ms. Metzger may recommend your purchase of certain insurance products such as term life and fixed annuities, and provide general financial consulting on matters such as saving, budgeting, and general financial education.

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.

Item 5 - Additional Compensation

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

Item 6 – Supervision

This section explains how Virtus Wealth supervises the Investment Advisor Representative, including how the advice the Investment Advisor Representative provided to clients is monitored.

Virtus Wealth 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. Mr. Hall can be reached at (314) 395-6133.

Item 7 – Requirements for State Registered Advisors

In addition to the events listed in Item 3 of Part 2B, if the Investment Advisor Representative 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 Investment Advisor Representative 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.