

W3 Wealth Advisors LLC.

90 N Miller Rd

Akron, OH 44333

(330) 836-3805

March 31, 2018

This brochure supplement provides information about **Shelby Morgan**, Investment Advisor Representative, which supplements the W3 Wealth Advisors, LLC ("W3") Form ADV Part 2A Brochure. If you have any questions about the contents of this Brochure, please contact us at (330) 836-3805 or via e-mail at Frank2@w3wealth.com. Please inform **Shelby Morgan** at the contact information listed on page 2 if you did not receive W3's Form ADV Part 2A Brochure or if you have any questions about the contents of this supplement. Additional information about W3 and **Shelby Morgan** is available on the SEC's website at www.adviserinfo.sec.gov and FINRA's website at www.finra.org/brokercheck.

Part 2B of Form ADV - Brochure Supplement

Shelby Morgan

90 N Miller Rd
Akron, OH 44333
(330) 836-3805

Date of Birth: 4/18/1962

Education:

- BS Business Finance — University of Akron

Examinations and Professional Designations:

- Series 7 — General Securities Representative
- Series 63 — Uniform Securities Agent State Law Exam

Business Experience:

- Partner, W3 Wealth Management, July 2006 to Present
- Partner/Investment Advisor Representative, W3 Wealth Advisors, LLC, 3/2006 to Present
- Registered Representative, ValMark Securities, Inc., September, 1997 to Present
- Investment Advisor Representative, ValMark Advisers, Inc., April, 1999 to Present
- Sole Proprietor — Private wealth planning, Inc. October, 1987 to July 2006

Disciplinary Information

Registered investment advisers are required to disclose material facts regarding any investment related legal or disciplinary events, including issues involving criminal or civil actions, findings resulting from administrative proceeding before the SEC, a self-regulatory body or any other federal or state regulatory authority that would be material to your evaluation of each supervised person providing investment advice.

Shelby Morgan has no disciplinary record that would impact a client's evaluation of the practice.

Other Business Activities

Shelby Morgan is also an investment advisor representative of ValMark Advisers, Inc., an investment adviser registered with the SEC. He is eligible to receive advisory fees associated with work performed for customers of ValMark Advisers. These fees are separate from fees earned for work with W3 Wealth Advisors LLC.

Shelby Morgan is a registered representative of ValMark Securities, Inc., a broker dealer under common ownership and management of ValMark Advisers, Inc. Shelby Morgan is eligible to receive normal commissions associated with securities sales.

Shelby Morgan is also an insurance agent affiliated with Executive Insurance Agency, Inc., an agency under common ownership and management of ValMark Advisers, Inc. Shelby Morgan is also eligible to receive insurance commissions surrounding the sales of insurance products sold through the affiliated insurance agency, Executive Insurance Agency, Inc.

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Additional Compensation

There is no additional compensation awarded for providing financial planning services, such as sales awards or prizes.

Supervision

Before accepting and implementing investment strategies recommended, supervisory principals at W3 review and approve of the investment strategies. Accounts are reviewed periodically, usually at least annually by your advisor. The compliance team also periodically reviews accounts and strategies. These initial and ongoing reviews are under the direction of Chief Compliance Officer, Mr. Frank P. Bevilacqua II who may be reached at (330) 836-3805 or via e-mail at FRANK2@W3WEALTH.COM to discuss questions or concerns in connection with the internal compliance program.

Information for State Registered Advisors

Shelby Morgan has no additional information to disclose