

This brochure supplement provides information about George Thompson Bryant that supplements the Apogee Wealth Partners, LLC brochure. You should have received a copy of that brochure. Please contact George Thompson Bryant if you did not receive Apogee Wealth Partners, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about George Thompson Bryant is also available on the SEC's website at www.adviserinfo.sec.gov.

Apogee Wealth Partners, LLC

Form ADV Part 2B – Individual Disclosure Brochure

for

George Thompson Bryant

Personal CRD Number: 1860625

Investment Adviser Representative

Apogee Wealth Partners, LLC
509 Riding Trail Way
Chattanooga, TN 37405
(423) 567-1888
george@apogeeWP.com

UPDATED: 03/15/2023

Item 2: Educational Background and Business Experience

Name: George Thompson Bryant **Born:** 1958

Educational Background and Professional Designations:

Education:

Bachelor of Science Economics, Wofford College - 1981

Designations:

CFP® - Certified Financial Planner

The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP (with flame design) marks (collectively, the “CFP® marks”) are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”).

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- Education – Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board’s studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a Bachelor’s Degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP Board’s financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;
- Examination – Pass the comprehensive CFP® Certification Examination. The examination includes case studies and client scenarios designed to test one’s ability to correctly diagnose financial planning issues and apply one’s knowledge of financial planning to real world circumstances;
- Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and

- Ethics – Agree to be bound by CFP Board’s *Standards of Professional Conduct*, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- Continuing Education – Complete 30 hours of continuing education hours every two years, including two hours on the *Code of Ethics* and other parts of the *Standards of Professional Conduct*, to maintain competence and keep up with developments in the financial planning field; and
- Ethics – Renew an agreement to be bound by the *Standards of Professional Conduct*. The Standards prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board’s enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

Business Background:

03/2021 - Present	Member & Investment Adviser Representative Apogee Wealth Partners, LLC
07/2014 - 03/2021	Portfolio Manager Barnett & Company Inc.
10/2013 - 07/2014	Wealth Advisor HHM Wealth Advisors, LLC
07/2013 - 10/2013	Unemployed
01/2011 - 07/2013	Banking Svc Consultant III FTB Advisors, Inc.
09/2009 - 01/2011	Banking Svc Consultant III First Tennessee Bank, N.A.
04/2007 - 09/2009	Vice President Barnett & Company Inc.

Item 3: Disciplinary Information

Registered investment advisors are required to disclose all material facts regarding any legal or disciplinary events that would materially affect your evaluation of Apogee Wealth Partners LLC.

There are no disciplinary disclosures to report.

Item 4: Other Business Activities

None.

Item 5: Additional Compensation

George Thompson Bryant does not receive any economic benefit from any person, company, or organization, other than Apogee Wealth Partners, LLC in exchange for providing clients advisory services through Apogee Wealth Partners, LLC.

Item 6: Supervision

As a representative of Apogee Wealth Partners, LLC, George Thompson Bryant works closely with the supervisor, Christopher Hopkins, and all advice provided to clients is reviewed by the supervisor prior to implementation. George Thompson Bryant adheres to applicable regulations regarding the activities of an Investment Adviser Representative, together with all policies and procedures outlined in the firm's code of ethics and compliance manual. Christopher Hopkins' phone number is 423-567-1888.

Item 7: Requirements For State Registered Advisers

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

- A. George Thompson Bryant 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. George Thompson Bryant has NOT been the subject of a bankruptcy.