



# ADV PART 2B BROCHURE

**LOGAN J. WETZEL**

APELLA CAPITAL, LLC

D/B/A

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This Form ADV 2B ("Brochure Supplement") provides information about the background and qualifications of Logan Wetzel (CRD #7288604). The information in this brochure supplements the Part 2A brochure of Apella Capital, LLC d/b/a Apella Wealth (hereinafter "Apella" or "firm"), which you should have received a copy of. Please contact our Chief Compliance Officer at (860) 785-2260 or [trichards@apellawealth.com](mailto:trichards@apellawealth.com) if you did not receive Apella's Part 2A brochure or have any questions about the contents of this supplement. Additional information about Logan Wetzel is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## ITEM 2 – EDUCATIONAL BACKGROUND & BUSINESS EXPERIENCE

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### LOGAN WETZEL

- CRD #: 7288604
- YEAR OF BIRTH: 1996

### EDUCATIONAL BACKGROUND:

- 2020: Villanova University; B.A. Economics

### BUSINESS BACKGROUND:

- 2023 – Present: Apella; Associate Wealth Advisor
- 2021 – 2023: Apella; Client Relationship Manager
- 2020 – 2021: Vanguard; Asset Transfer Specialist

## ITEM 3: DISCIPLINARY INFORMATION

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Registered investment advisers must disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice.

Logan Wetzel has no history of any legal or disciplinary events deemed material to a client's consideration of Logan Wetzel to act as their investment adviser representative. FINRA's BrokerCheck® system and the Investment Adviser Public Disclosure system provide additional information regarding the registration and disciplinary history of Logan Wetzel. Please visit FINRA's BrokerCheck® system at <https://brokercheck.finra.org> or the IAPD system at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) for additional information.

## ITEM 4: OTHER BUSINESS ACTIVITIES

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Logan Wetzel does not engage in any other investment-related business or occupation outside of their role with Fiduciary Financial Advisors. This means the supervised person devotes their full professional time to providing advisory services through Fiduciary Financial Advisors and has no other business interests, affiliations, or roles that could create a potential conflict of interest.

## ITEM 5: ADDITIONAL COMPENSATION

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Logan Wetzel does not receive any economic benefit outside of the salaries and bonuses described in Item 4 of this brochure or on Form ADV Part 2A Items 10 and 12.

## ITEM 6: SUPERVISION

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Logan Wetzel is supervised by Thomas Cock, Regional Director at Apella. Mr. Cock can be reached at 800-386-3004. Logan Wetzel is supervised through a compliance program designed to prevent and detect federal and state securities law violations.

Ultimate supervisory authority and responsibility for compliance matters rests with the firm's Chief Compliance Officer (CCO), Timothy Richards, who monitors the overall effectiveness of the firm's supervisory structure. The CCO may review the IAR's activities as part of the firm's broader compliance testing program, including reviews of client files, trade activity, and communications, as warranted. Thomas Cock can be reached at 800-386-3004.

