# ITEM 1 - COVER PAGE

A grey letter on a black background

Description automatically generated

ADV PART 2B

BROCHURE

**PATRICK A. SWEENY**

APELLA CAPITAL, LLC

D/B/A APELLA WEALTH

65 MEMORIAL ROAD, SUITE C340

WEST HARTFORD, CT 06107

O / 860.785.2260

W / APELLAWEALTH.COM

SEPTEMBER 2025

This Form ADV 2B (“Brochure Supplement”) provides information about the background and qualifications of Patrick Sweeny (CRD #1490512). 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 if you did not receive Apella’s Part 2A brochure or have any questions about the contents of this supplement. Additional information about Patrick Sweeny is available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

# ITEM 2 – EDUCATIONAL BACKGROUND & BUSINESS EXPERIENCE

## PATRICK SWEENY

* CRD #: 1490512
* YEAR OF BIRTH: 1961

## Educational Background:

* 1983: Fairfield University, B.A. Economics

## BUSINESS BACKGROUND:

* 2014 – Present: Apella Wealth, CEO

# ITEM 3: DISCIPLINARY INFORMATION

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.

Patrick Sweeny has no history of any legal or disciplinary events deemed material to a client’s consideration of Patrick Sweeny to act as their investment adviser representative. FINRA’s BrokerCheck® system and the Investment Adviser Public Disclosure system provides additional information regarding the registration history of Patrick Sweeny. 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

Patrick Sweeny does not engage in any other investment-related business or occupation outside of his role with Apella.

# ITEM 5: ADDITIONAL COMPENSATION

Patrick Sweeny 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

Patrick Sweeny is supervised by Timothy Richards, Chief Compliance Officer (CCO) of Apella. Mr. Richards is responsible for overseeing the day-to-day advisory activities conducted by Patrick Sweeny. Mr. Richards and/or the Compliance department conduct periodic reviews of the IAR’s advisory work to ensure it is consistent with applicable regulatory requirements and the firm's compliance program. Questions regarding supervision may be directed to Timothy Richards, Chief Compliance Officer, at 860-785-2260.