ITEM 1 - COVER PAGE

ADV PART 2B BROCHURE

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This Form ADV 2B ("Brochure Supplement") provides information about the background and qualifications of Shelly Braden (CRD #6397233). 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 Shelly Braden is available on the SEC's website at www.adviserinfo.sec.gov.

ITEM 2 – EDUCATIONAL BACKGROUND & BUSINESS EXPERIENCE

SHELLY H. BRADEN, CFP®, BFA™

- CRD #: 6397233
- YEAR OF BIRTH: 1985

EDUCATIONAL BACKGROUND:

- 2017: Golden Gate University; Masters in Financial Planning & Taxation
- 2009: Belmont Abbey College; Bachelors in Business Management

BUSINESS BACKGROUND:

- 12/2025 – Present: Apella Wealth; Partner and Senior Wealth Advisor
- 04/2020 – 12/2025: PBMares Wealth Management, LLC; Senior Wealth Advisor
- 08/2018 – 04/2020: Commonwealth Financial Network; Registered Staff Member
- 08/2018 – 04/2020: Cornerstone Wealth; Registered Staff Member
- 01/2018 – 08/2018: PBMares Wealth Management, LLC; Wealth Advisor
- 04/2011 – 12/2017: KLS Professional Advisors Group, LLC; Analyst

PROFESSIONAL DESIGNATIONS:

- CERTIFIED FINANCIAL PLANNER® (CFP®)
- BEHAVIORAL FINANCIAL ADVISOR (BFA™)

CERTIFIED FINANCIAL PLANNER ("CFP®") DESIGNATION MINIMUM QUALIFICATIONS

I am certified for financial planning services in the United States by the Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER® professional or a CFP® professional, and I may use these and the CFP Board's other certification marks (the "CFP Board Certification Marks"). The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at www.CFP.net.

CFP® professionals have met the CFP Board's high standards for education, examination, experience, and ethics. To become a CFP® professional, an individual must fulfill the following requirements:

- Education – Earn a bachelor's degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas the CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirements through other qualifying credentials. CFP Board implemented the bachelor's degree or higher requirement in 2007 and the financial planning development capstone course requirement in March 2012. Therefore, a CFP® professional who first became certified before those dates may not have earned a bachelor's or higher degree or completed a financial planning development capstone course.

- Examination – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual's ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.

- Experience – Complete 6,000 hours of professional experience related to the personal financial planning process or 4,000 hours of apprenticeship experience that meets additional requirements.

- Ethics – Satisfy the Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement and agree to be bound by CFP Board's Code of Ethics and Standards of Conduct ("Code and Standards"), which sets forth the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements to remain certified and maintain the right to continue to use the CFP Board Certification Marks:

- Ethics – Commit to complying with the CFP Board's Code and Standards. This includes a commitment to the CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.

- Continuing Education – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

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.

BEHAVIORAL FINANCIAL ADVISOR (BFA™) DESIGNATION MINIMUM QUALIFICATIONS

I hold the Behavioral Financial Advisor™ (BFA™) designation, which is granted jointly by Kaplan Financial Education and think2perform, a leadership and behavioral sciences firm. The BFA™ designation is voluntary. No federal or state law or regulation requires financial professionals to hold the BFA™ designation. Additional information regarding the BFA™ program is available at www.think2perform.com.

The BFA™ designation focuses on the integration of traditional financial planning with behavioral science to help clients improve decision-making, increase financial follow-through, and reduce common emotional biases. To earn the BFA™ designation, individuals must meet the following requirements:

- Education - Complete the Behavioral Financial Advisor™ training program, which includes coursework on behavioral economics, emotional competence, values-based decision frameworks, goal-formation processes, and advisor-client communication strategies. The curriculum emphasizes both the theory and application of behavioral principles within financial planning.

- Examination - Pass the BFA™ certification exam, which assesses a candidate's understanding of behavioral finance concepts, decision-making frameworks, and practical application of behavioral coaching techniques in client planning scenarios.

- Ethics & Conduct - Agree to abide by professional conduct guidelines established by think2perform and Kaplan, including maintaining client confidentiality, acting with integrity, and engaging in client interactions in a manner consistent with behavioral coaching best practices.

- Experience - Although no specific years-of-experience requirement exists, BFA™ candidates are typically financial professionals working directly with clients in advisory, planning, or coaching roles. Program providers may require participants to hold certain industry credentials—or be actively working toward a financial-services designation—before enrollment.

Individuals who earn the BFA™ designation must complete ongoing requirements to maintain active status:

- Continuing Education - Satisfy continuing education requirements established by think2perform and Kaplan. Continuing education ensures that BFA™ professionals remain current on behavioral research, financial decision-making trends, and advances in the behavioral sciences.
- Good Standing - Maintain good standing with think2perform and Kaplan Financial Education, including compliance with any renewal requirements, ethical standards, and program-updated learning modules.

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.

Shelly Braden has no history of any legal or disciplinary events deemed material to a client's consideration of Shelly Braden 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 Shelly Braden. Please visit FINRA's BrokerCheck® system at https://brokercheck.finra.org or the IAPD system at www.adviserinfo.sec.gov for additional information.

ITEM 4: OTHER BUSINESS ACTIVITIES

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

ITEM 5: ADDITIONAL COMPENSATION

Shelly Braden 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

Shelly Braden is supervised by Rob Klingensmith. Rob Klingensmith is responsible for overseeing the day-to-day advisory activities conducted by Shelly Braden. Rob Klingensmith conducts periodic reviews of the IAR's advisory work to ensure it is consistent with applicable regulatory requirements and the firm's compliance program. Rob Klingensmith can be reached at 757-229-7180.

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.