

ITEM 1 - COVER PAGE



ADV PART 2B BROCHURE

THOMAS LEVINSON

APELLA CAPITAL, LLC

D/B/A APELLA WEALTH

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This Form ADV 2B ("Brochure Supplement") provides information about the background and qualifications of Thomas Levinson (CRD #6416322). 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 Thomas Levinson is available on the SEC's website at www.adviserinfo.sec.gov.

ITEM 2 – EDUCATIONAL BACKGROUND & BUSINESS EXPERIENCE

THOMAS LEVINSON

- CRD #:6416322
- YEAR OF BIRTH: 1974

EDUCATIONAL BACKGROUND:

- 2005: University of Chicago Law School: JD
- 1999: Harvard Divinity School: MTS
- 1996: Princeton University: AB, Religion

BUSINESS BACKGROUND:

- 2025 – Present: Apella: Partner, Partner and Senior Wealth Advisor
- 2014 – 2025: Park Piedmont Advisors, LLC: Member
- 2018 – Present: Money & Meaning, LLC: Member
- 2005 – 2014: Reed Smith LLP: Attorney

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.

Thomas Levinson has no history of any legal or disciplinary events deemed material to a client's consideration of Thomas Levinson 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 Thomas Levinson. 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

In addition to their role with Apella, Thomas Levinson is engaged in the following outside business activities:

CO-FOUNDER: MONEY & MEANING, LLC

Thomas Levinson is a co-founder of Money & Meaning, LLC, which provides customized education, coaching and facilitation to help High Net Worth families navigate complex life and family-owned business transitions. Mr. Levinson's responsibilities at Money & Meaning include helping to lead its overall strategic direction and providing education and guidance to its clients. Money & Meaning is affiliated with Park Piedmont Advisors, LLC through common control and ownership. When appropriate, Mr. Levinson may recommend that you use the services of Money & Meaning. This practice may present a conflict of interest because we have a financial incentive to recommend the services of Money & Meaning. You are under no obligation to use the services of any firm we recommend, whether affiliated or otherwise, and may obtain comparable services and/or lower fees through other firms. Park Piedmont's advisory services are separate and distinct from the services provided by Money & Meaning, and compensation earned by Money & Meaning is separate from our advisory fees. Mr. Levinson spends less than 50% of his time at Money & Meaning.

ITEM 5: ADDITIONAL COMPENSATION

Thomas Levinson 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

Thomas Levinson is supervised by Jason Gentile, Chief Wealth Officer. Mr. Gentile is responsible for overseeing the day-to-day advisory activities conducted by Thomas Levinson. Mr. Gentile conducts periodic reviews of the IAR's advisory work to ensure it is consistent with applicable regulatory requirements and the firm's compliance program. Jason Gentile can be reached at 860-785-2260.

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.