



Kevin M. Young, MBA, EA, CFP®

kyoung@apellawealth.com

502 Mace Boulevard

Suite #5

Davis, California 95618

781.743.2603

Apella Capital, LLC

65 Memorial Road, Suite C340

West Hartford, CT 06107

www.apellawealth.com

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**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Kevin M. Young that supplements the Apella Capital, LLC, DBA Apella Wealth (“Apella”) brochure. You should have received a copy of that brochure. Please contact Timothy Richards at 860-785-2260 if you did not receive the brochure or if you have any questions about the contents of this supplement.

Additional information about Kevin M. Young is available on the SEC’s website at www.adviserinfo.sec.gov. His individual CRD number is 5439853.

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Educational Background and Business Experience

Form ADV Part 2B, Item 2

Kevin M. Young, MBA, EA, CFP®

Year of Birth: 1965

Formal Education after High School:

- Arizona State University, Bachelor of Science, Operations Management
- California Lutheran University, Master of Business Administration, emphasis in Financial Planning

Business Background:

- Young Wealth Management, President - January 2007 – Present
- Horseshoe Management, Inc., Advisory Board Member, November 2006 – Present
- Amgen Inc. and Genentech Inc., Operations Management Positions, July 1992 – November 2005
- Internal Revenue Service, Enrolled Agent (“EA”)

Professional Registrations and Licenses

- Series 65 Uniform Investment Advisor Law Examination
- Certified Financial Planner™ Professional - September 2011 to present

CFP® — CERTIFIED FINANCIAL PLANNER™: Mr. Young obtained the CERTIFIED FINANCIAL PLANNER™ designation in September 2011. The CERTIFIED FINANCIAL PLANNER™, CFP®, and federally registered CFP marks are professional certification marks granted in the United States by the Certified Financial Planner Board of Standards, Inc. (“CFP Board”).

The CFP® designation is a voluntary designation; no federal or state law or regulation requires financial planners to hold the CFP® designation. It is recognized in the United States and a number of other countries for its high standard of professional education, stringent code of conduct and standards of practice and 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: 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; attain a bachelor’s degree from a regionally accredited United States college or university (or its equivalent from a foreign university); pass the comprehensive CFP® certification examination; complete at least three years of full-time financial planning-related experience; and agree to be bound by CFP Board’s Standards of Professional Conduct.

The Standards of Professional Conduct 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.

Disciplinary Information

Form ADV Part 2B, Item 3

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

No information is applicable to this item for Mr. Young

- A. Mr. Young has never been subject to a criminal or civil action in a domestic, foreign or military court of competent jurisdiction in which the supervised person
1. was convicted of, or plead guilty or nolo contendere ("no contest") to (a) any felony; (b) a misdemeanor that involved investments or an investment-related business, fraud, false statements or omissions, wrongful taking of property, bribery, perjury, forgery, counterfeiting, or extortion; or (c) a conspiracy to commit any of these offenses;
 2. is the subject of a pending criminal proceeding that involves an investment-related business, fraud, false statements, or omissions, wrongful taking of property, bribery, perjury, forgery, counterfeiting, extortion, or a conspiracy to commit any of these offenses;
 3. was found to have been involved in a violation of an investment-related statute or regulation; or
 4. was the subject of any order, judgment, or decree permanently or temporarily enjoining, or otherwise limiting, the supervised person from engaging in any investment-related activity, or from violating any investment-related statute, rule, or order.
- B. Mr. Young has never been subject to an administrative proceeding before the SEC, any other federal regulatory agency, any state regulatory agency, or any foreign financial regulatory authority in which the supervised person
1. was found to have caused an investment-related business to lose its authorization to do business; or
 2. was found to have been involved in a violation of an investment-related statute or regulation and was the subject of an order by the agency or authority
 - a) denying, suspending, or revoking the authorization of the supervised person to act in an investment-related business;
 - b) barring or suspending the supervised person's association with an investment-related business;
 - c) otherwise significantly limiting the supervised person's investment-related activities; or
 - d) imposing a civil money penalty of more than \$2,500 on the supervised person.
- C. Mr. Young has never been subject to a self-regulatory organization (SRO) proceeding in which the supervised person
1. was found to have caused an investment-related business to lose its authorization to do business; or
 2. was found to have been involved in a violation of the SRO's rules and was: (i) barred or suspended from membership or from association with other members or was expelled from membership; (ii) otherwise significantly limited from investment-related activities; or (iii) fined more than \$2,500.
- D. Mr. Young has never been subject to any other proceeding in which a professional attainment, designation, or license of the supervised person was revoked or suspended because of a violation of rules relating to professional conduct.

Other Business Activities

Form ADV Part 2B, Item 4

Mr. Young is the co-author of the 2010 PassKey EA Review Complete: Individuals, Businesses and Representation: IRS Enrolled Agent Exam Study Guide. Mr. Young is not currently engaged in any outside investment-related business activities and has no relationships which would create a material conflict of interest with clients.

Additional Compensation

Form ADV Part 2B, Item 5

Mr. Young does not receive any additional compensation such as, but not limited to, sales awards, other prizes and from any other source outside of Apella.

Supervision

Form ADV Part 2B, Item 6

Mr. Young is supervised by Evelyn Zohlen, Regional Director at Apella. Ms. Zohlen can be reached at 714-971-0663.