



Samuel A. Marrella, Jr.

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**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Samuel A. Marrella, Jr. 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 Samuel A. Marrella, Jr. is available on the SEC’s website at www.adviserinfo.sec.gov. His individual CRD number is 6095575.

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Educational Background and Business Experience

Form ADV Part 2B, Item 2

Samuel A. Marrella, Jr.

Year of Birth: 1992

Formal Education after High School:

- Albright College, Bachelor of Science, Finance

Employment History:

- Apella Wealth, Senior Financial Advisor (March 2025 – Present)
- Marrella Private Wealth, LLC, Financial Advisor and Secretary (October 2023 to March 2025)
- Marrella Insurance Group, LLC, Agent (October 2023- Present)
- Raymond James Financial Services Advisors, Inc., Investment Adviser Representative (November of 2020 to October 2023)
- Raymond James Financial Services, Financial Advisor (June of 2020 to October of 2023)
- Resource Securities, Vice President of Sales, Mid-Atlantic (September of 2015 to October 2020)
- Vanguard Marketing Corporation, Client Services Representative (July of 2014 to September of 2015)
- Marrella Financial Group, Associate (October of 2012 to July of 2014)
- Albright College, Student (August 2010 to 2014)

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 Samuel A. Marrella, Jr.

- A. Samuel A. Marrella, Jr. 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. Samuel A. Marrella, Jr. 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. Samuel A. Marrella, Jr. 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. Samuel A. Marrella, Jr. 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

Samuel A. Marrella, Jr. is a licensed insurance agent. See Item 5 for more details on this outside business activity.

Additional Compensation

Form ADV Part 2B, Item 5

Samuel A. Marrella, Jr. is a licensed insurance agent and receives fees for the sale of fixed insurance products, and in some instances, ongoing compensation called trailing fees. This compensation gives Mr. Marrella an incentive to recommend insurance products in addition to advisory services. We address this conflict of interest by upholding our fiduciary duty to provide investment advice that is in the client's best interest and disclosing the conflict of interest.

Supervision

Form ADV Part 2B, Item 6

Samuel A. Marrella, Jr. is supervised by Paul L. Marrella, Regional Director at Apella. Mr. Marrella can be reached at (610) 655-9700.