



Jamison I. McAndie

4900 Meadows Road
Suite 130
Lake Oswego, OR 97035
503.636.1443

Apella Capital, LLC

151 National Drive
Glastonbury, CT 06033

February 2023

**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Jamison I. McAndie that supplements the Apella Capital, LLC (“Apella”) brochure. You should have received a copy of that brochure. Please contact Timothy Richards at 860-781-6550 if you did not receive the brochure or if you have any questions about the contents of this supplement.

Additional information about Jamison I. McAndie is available on the SEC’s website at www.adviserinfo.sec.gov. His individual CRD number is 7323911.

Table of Contents

<i>Educational Background and Business Experience</i>	<i>1</i>
<i>Disciplinary Information.....</i>	<i>2-3</i>
<i>Other Business Activities</i>	<i>4</i>
<i>Additional Compensation</i>	<i>5</i>
<i>Supervision</i>	<i>6</i>

Educational Background and Business Experience

Form ADV Part 2B, Item 2

Jamison I. McAndie

Year of Birth: 1986

Formal Education after High School: Portland State University, Bachelor of Science in Liberal Studies

Business Background for the Previous Ten Years:

- Mr. McAndie is registered as a Financial Adviser Representative with Apella. Mr. McAndie started with Apella in 2023 as an Associate Financial Adviser. Prior to joining Apella, Mr. McAndie worked at the following financial institutions:
 - Associate Adviser/Paraplanner, LPL Financial (07/2021 – 01/2023)
 - Paraplanner/Adviser Assistant, Waddell & Reed (12/2020 – 07/2021)
 - Project Manager, Dynamic Resources (02/2020- 06/2020)
 - Marketing Manager, Image Media (08/2015 – 01/2020)
 - Design Account Manager, Gameday Media (06/2009 – 08/2015)

Certifications and Professional Designations:

Chartered Retirement Planning Counselor 2021

Chartered Retirement Planning Counselor:

The Chartered Retirement Planning CounselorSM, or CRPC[®] program, is a designation program administered by the Kaplan College for Financial Planning for financial professionals. This program enables experienced advisors, who are focused on retirement planning for individuals, define a “road map to retirement.” There is a focus on clients’ pre- and post-retirement needs, as well as issues related to asset management and estate planning.

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.

Jamison I. McAndie

No information is applicable to this item for Mr. McAndie.

- A. Mr. McAndie 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 named 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. McAndie 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. McAndie 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.

Form ADV Part 2B, Item 3

- D. Mr. McAndie 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

Jamison I. McAndie

Form ADV Part 2B, Item 4

- Mr. McAndie not engaged in any investment or non-investment related business activities separate from Apella.

Additional Compensation

Form ADV Part 2B, Item 5

Mr. McAndie 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. McAndie is supervised by Taylor Drake, a Senior Financial Advisor and Partner at Apella. Mr. Drake can be reached at 503-636-1443.