

BROCHURE SUPPLEMENT

June 2022

This brochure supplement provides information about Robert J. Morella that supplements the Apex Capital Management, LLC brochure. You should have received a copy of that brochure. Please contact Robert J. Morella if you did not receive the Apex Capital Management, LLC brochure or if you have any questions about the contents of this supplement.

Additional information about Robert J. Morella is available on the SEC's website at www.adviserinfo.sec.gov.

Robert J. Morella
Apex Capital Management, LLC
701 Robley Drive, Suite 200
Lafayette, Louisiana 70503
Phone: (337) 984-7010
www.apexcapitalmanagement.com

Educational Background and Business Experience

Date of Birth: 1958
CRD# 4473330

Education:
Nichols State University: 1976-1977
University of Southwestern Louisiana: BS/BA, Accounting, 1980

Professional Designations:
Certified Public Accountant: 1983¹
Personal Financial Specialist: 1991²

Business Background:
Apex Capital Management, LLC: Managing Member, 10/99-present; Chief Compliance Officer and Investment Advisor Representative, 8/08-present
Arsement, Redd & Morella, LLC: Member, 1/88-present

Disciplinary Information

Robert J. Morella has no legal or disciplinary history to report.

Other Business Activities

Robert J. Morella is an owner of and a Certified Public Accountant with Arsement, Redd & Morella, LLC (ARM). If he determines that an advisory client is in need of tax or accounting services, the client may be referred to ARM. In addition, if accounting clients of ARM are in need of financial planning or other advisory services, Mr. Morella, in his separate capacity as a Certified Public Accountant, may refer those clients to Apex Capital Management, LLC for advisory services. Clients are not obligated in any manner to use the services or an accounting firm recommended by Mr. Morella. If a client of Apex Capital Management, LLC also becomes an accounting client of ARM, the client is charged separately for the accounting services.

The time spent by Mr. Morella on advisory and accounting activities varies depending upon the calendar (i.e., tax season) and the marketplace (i.e., turbulent economic or market conditions). Advisory and accounting services are the only activities that Mr. Morella spends time on during the work week.

Additional Compensation

Certain product sponsors may provide Robert J. Morella with other economic benefits as a result of his recommending or selling the product sponsors' investments. The economic benefits he receives from product sponsors can include, but are not limited to, financial assistance or the sponsorship of conferences and educational sessions, marketing support, incentive awards, payment of travel expenses, and tools to assist him in providing various services to clients.

Apex Capital Management, LLC and Robert J. Morella endeavor at all times to put the interest of its clients ahead of their own interests or those of the advisor's officers, directors, or representatives ("affiliated persons"). However, these arrangements could affect Mr. Morella's judgment when recommending investment products and present a conflict of interest that may affect his judgment.

Supervision

Robert J. Morella is the Managing Member and the Chief Compliance Officer of Apex Capital Management, LLC. He is responsible for developing, overseeing and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives, including himself. He can be contacted at (337) 984-7010.

Requirements for State-Registered Advisers

Robert J. Morella has not been involved in an arbitration award and has not been found liable in an arbitration claim alleging damages in excess of \$2,500. He has not been involved in any award or found liable in any civil, self-regulatory organization, or administrative proceeding. Additionally, he has not been the subject of a bankruptcy petition.

Professional Designation Disclosure

¹ A Certified Public Accountant (CPA) primarily provides financial audit services, including attesting to the reasonableness of disclosures, freedom from material misstatements and adherence to applicable generally accepted accounting principles. To become a CPA, a candidate must pass the Uniform Certified Public Accountant Examination set by the American Institute of Certified Public Accountants and administered by the National Association of State Boards of Accountancy. Typically, eligibility to sit for the examination requires a candidate to have a Bachelor's Degree that includes a minimum number of qualifying credit hours in accounting and business administration plus an additional one year study. Candidates are also required to have public accounting work experience, with minimum requirements varying from state to state. Applicants for CPA status must also complete a special examination on ethics, including a review of state specific rules for professional practice. All CPAs are required to take continuing education courses. The requirements vary by state but usually require 120 hours of continuing education every three years with at least 20 hours taken every year. Many states require CPAs to take an ethics course during every renewal period, with courses ranging from 2-8 hours.

² The Personal Financial Specialist (PFS) designation is offered by The American Institute of Certified Public Accountants (AICPA). A candidate must (1) be a member of AICPA, (2) hold an unrevoked CPA certificate issued by a state authority, (3) have at least 2 years of full-time business personal financial planning experience (including up to 1,000 hours of tax compliance) within the 5 year period preceding application for the designation. In addition, the candidate must have a minimum of 80 hours of personal financial education within the 5 year period preceding the date of application and must pass a final certification examination. Designees must complete 60 hours of continuing professional education every 3 years which must be related to the personal financial planning body of knowledge.