



Apex Capital Management, LLC

Part 2B Form ADV
Brochure Supplement

2/3/2025

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This Form ADV 2B ("Brochure Supplement") provides information about the background and qualifications of Robert J. Morella (CRD# 4473330) that supplements the Apex Capital Management, LLC ("Apex" or the "Advisor", CRD# 117059) ADV Part 2 - Disclosure Brochure. You should have received a copy. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of the ADV Part 2 Disclosure Brochure for Apex Capital Management, LLC, or this ADV Part 2B Brochure Supplement, please contact us at (337) 895-0800.

Additional information about Robert J. Morella is available on the SEC's website at www.adviserinfo.sec.gov by searching with his full name or his Individual CRD# 4473330.



Robert Morella, CPA/PFS, CFP®

Year of Birth 1958
CRD# 4473330

ITEM 2: EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Educational Background:

Nichols State University: 1976-1977

University of Southwestern Louisiana: BS/BA in Accounting, 1980

Business Experience:

Managing Member, Chief Compliance Officer, and Investment Advisor Representative, Apex Capital Management, LLC	10/1999 to Present
CPA-Partner, Morella & Morella, LLC	04/2024 to Present
CPA-Partner, Arsement, Redd & Morella, LLC	01/1988 to 04/2024

Professional Designations:

Certified Public Accountant (CPA)

Certified Public Accountants (CPA) are licensed and regulated by their state boards of accountancy. While state laws and regulations vary, the education, experience and testing requirements for licensure as a CPA generally include minimum college education (typically 150 credit hours with at least a baccalaureate degree and a concentration in accounting), minimum experience levels (most states require at least one year of experience providing services that involve the use of accounting, attest, compilation, management advisory, financial advisory, tax or consulting skills, all of which must be achieved under the supervision of or verification by a CPA), and successful passage of the Uniform CPA Examination. In order to maintain a CPA license, states generally require the completion of 40 hours of continuing professional education (CPE) each year (or 80 hours over a two-year period, or 120 hours over a 3-year period). Additionally, all American Institute of Certified Public Accountants (AICPA) members are required to follow a rigorous Code of Professional Conduct which requires that they act with integrity, objectivity, due care, competence, fully disclose any conflicts of interest (and obtain client consent if a conflict exists), maintain client confidentiality, disclose to the client any commission or referral fees, and serve the public interest when providing financial services.

In addition to the Code of Professional Conduct, AICPA members who provide personal financial planning services are required to follow the Statement on Standards in Personal Financial Planning Services (the Statement). Most state boards of accountancy define financial planning as the practice of public accounting and therefore have jurisdiction over CPAs practicing in this discipline; state boards would likely look to the Statement as the authoritative guidance in this practice area regardless of specific or blanket adoption of AICPA standards.

The Personal Financial Specialist (PFS®)

The Personal Financial Specialist credential demonstrates that an individual has met the minimum education, experience, and testing required of a CPA in addition to a minimum level of expertise in personal financial planning. To attain the PFS® credential, a candidate must hold an unrevoked CPA license, certificate or permit, none of which are in inactive status; fulfill 3,000 hours of personal financial planning business experience; complete 75 hours of personal financial planning CPE credits; pass a comprehensive financial planning exam and be an active member of the AICPA. A PFS® credential holder is required to adhere to AICPA's Code of Professional Conduct and the Statement on Standards in Personal Financial Planning Services, when providing personal financial planning services. To maintain their PFS® credential, the recipient must complete 60 hours of financial planning CPE credits every three years. The PFS® credential is administered through the AICPA.

ITEM 3: DISCIPLINARY INFORMATION

Robert J. Morella has no legal, civil or disciplinary events to disclose. Robert J. Morella has never been involved in any regulatory, civil or criminal action. Additional Information about Robert J. Morella is available on the SEC's website at www.adviserinfo.sec.gov by searching with his full name or Individual CRD# 4473330.

ITEM 4: OTHER BUSINESS ACTIVITIES

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

ITEM 5: ADDITIONAL COMPENSATION

Robert J. Morella has additional business activities where compensation is received that are detailed in item 4 above.

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 may receive 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 the clients ahead of their own interests or those of the advisor's officers, directors, or representatives. However, these arrangements could affect Mr. Morella's judgment when recommending investment products and present a conflict of interest that may affect his judgment.

ITEM 6: SUPERVISION

Robert J. Morella the Managing Member and Chief Compliance Officer of Apex Capital Management, LLC. He is responsible for 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 337-895-0800.