



BROCHURE SUPPLEMENT

June 2023

This brochure supplement provides information about Stephen J. Morella that supplements the Apex Capital Management, LLC (“Apex Capital Management”) disclosure brochure. You should have received a copy of that brochure. Please contact Robert J. Morella at 337-984-7010 if you did not receive Apex Capital Management’s brochure or if you have any questions about the contents of this supplement.

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

Stephen J. Morella

Apex Capital Management, LLC
701 Robley Dr., Suite 200
Lafayette, LA 70503
337-984-7010

www.apexcapitalmanagement.com

Educational Background and Business Experience

Date of Birth: 1993
CRD # 7785093

Education:

University of Louisiana at Lafayette, Bachelors Degree in Accounting: 2019

Professional Designations:

Certified Public Accountant: 2021¹

Business Background:

Apex Capital Management, Investment Adviser Representative, 07/2023 to Present;
Arsement, Redd & Morella, LLC, CPA, 10/2019 to Present
First National Bank of Louisiana, Credit Analysts, 02/2019 to 10/2019

Disciplinary Information

Stephen J. Morella has no legal or disciplinary events to report.

Other Business Activities

Stephen J. Morella is 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, Stephen J. Morella acting 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 Stephen J. 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.

Additional Compensation

Stephen J. Morella has no additional; compensation to report.

Supervision

Robert J. Morella is the Chief Compliance Officer of Apex Capital Management. 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 Stephen J. Morella. Robert J. Morella can be contacted at 337-984-7010.

Requirements for State-Registered Advisers

Stephen 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.

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.