

Form ADV Part 2B: *Brochure Supplement*

Item 1 – Cover Page

Jonathan Brian Morgan
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This brochure supplement provides information about J. Brian Morgan that supplements the Taelos Financial Partners LLC disclosure brochure. You should have received a copy of that brochure. Please contact J. Brian Morgan at 919-355-2155 or jbrianmorgan@taelosfinancial.com

If you did not receive Taelos Financial Partners LLC's brochure or if you have any questions about the contents of this supplement.

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

Item 2 – Educational Background and Business Experience

J. Brian Morgan

Born: 1975

CRD # 6813169

Educational Background:

- North Carolina Wesleyan University, Bachelor of Science in Business Administration: 2014

Business Experience:

- Taelos Financial Partners LLC, Managing Member and Chief Compliance Officer, 03/2022 to Present and Investment Adviser Representative, 07/2022 to Present;
- Virginia Asset Management, LLC (VAM Partners) - Securian Financial Services Inc, Registered Representative and Investment Adviser Representative, 12/2020 to 03/2022
- Edward Jones, Registered Representative and Investment Adviser Representative, 06/2017 to 11/2020

Item 3 – Disciplinary Information

J. Brian Morgan has no legal or disciplinary events to report.

Item 4 – Other Business Activities

Insurance Agent

J. Brian Morgan formerly held life insurance licensing. As such he can provide advice and recommendations in favor or against different insurance policy types, products and options based on the client's best interest.

However, it is the firm's policy that J. Brian Morgan does not sell (i.e. serve as the selling agent) insurance and annuity products. In order to avoid the emergence of conflicts of interest J. Brian Morgan will never sell commission compensated insurance and/or annuity products to clients of Taelos Financial Partners LLC and therefore will never receive commissions from the sale of insurance and/or annuity products.

J. Brian Morgan may act as agent on so called Advisory Annuities wherein the assets held within the account call for investment management services. Taelos Financial Partners LLC will provide investment management on these accounts in the same fashion and fee schedule as described in the Asset Management Services sections of Form ADV Part 2A. Taelos Financial Partners LLC will not receive commissions or other compensation from any third party.

J. Brian Morgan may refer clients of the firm to a third party to facilitate purchase by the client of life insurance products (Term Life Insurance). However, no compensation will be received by J. Brian Morgan or Taelos Financial Partners LLC for such referral.

Item 5 – Additional Compensation

J. Brian Morgan does not receive compensation other than his normal salary and profits as an owner of the firm.

Item 6 – Supervision

J. Brian Morgan is the Chief Compliance Officer of Taelos Financial Partners 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. J. Brian Morgan can be contacted at 919-355-2155.

Item 7 – Requirements for State-Registered Advisers

J. Brian Morgan 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.

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