



Daneen M. Weaver
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MARCH 2025

**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Daneen M. Weaver that supplements the Apella Capital, LLC, DBA Apella Wealth ("Apella") brochure. You should have received a copy of that brochure. Please contact Timothy Richards at 860-785-2260 if you did not receive the brochure or if you have any questions about the contents of this supplement.

Additional information about Daneen M. Weaver is available on the SEC's website at www.adviserinfo.sec.gov. Her individual CRD number is 1711402.

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Educational Background and Business Experience

Form ADV Part 2B, Item 2

Daneen M. Weaver

Year of Birth: 1964

Formal Education after High School:

- Mount Saint Mary's University, Bachelor of Science Degree, Business & Finance, 1986
- St. Joseph's University, Master of Business Administration, 1992

Employment History:

- Apella Wealth, Senior Financial Advisors (March 2025 – Present)
- Marrella Private Wealth, LLC, Treasurer (October 2023 to March 2025)
- Marrella Insurance Group, LLC, Agent (October 2023- Present)
- Raymond James Financial Services, Inc., Financial Adviser (November 2001 to October 2023)
- Raymond James Financial Services Advisors, Inc., Investment Adviser Representative (February 2019 to October 2023)
- Marrella Financial Group, Administrative Assistant (January 2001 to November 2001)

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.

No information is applicable to this item for Daneen M. Weaver

- A. Daneen M. Weaver 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 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. Daneen M. Weaver 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. Daneen M. Weaver 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.
- D. Daneen M. Weaver 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

Form ADV Part 2B, Item 4

Daneen M. Weaver is a licensed insurance agent. See Item 5 for more details on this outside business activity.

Additional Compensation

Form ADV Part 2B, Item 5

Daneen M. Weaver is a licensed insurance agent and receives fees for the sale of fixed insurance products, and in some instances, ongoing compensation called trailing fees. This compensation gives Ms. Weaver an incentive to recommend insurance products in addition to advisory services. We address this conflict of interest by upholding our fiduciary duty to provide investment advice that is in the client's best interest and disclosing the conflict of interest.

Supervision

Form ADV Part 2B, Item 6

Daneen M. Weaver is supervised by Paul L. Marrella, Regional Director at Apella. Mr. Marrella can be reached at (610) 655-9700.