# **David C. Morgan**

Personal CRD Number: 7557464 Investment Adviser Representative

# The High Net Worth Advisory Group, LLC

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Form ADV Part 2B Brochure Supplement

This Brochure Supplement provides information about David C. Morgan that supplements the Disclosure Brochure of The High Net Worth Advisory Group (hereinafter "HNWAG"), a copy of which you should have received. Please contact HNWAG's Chief Compliance Officer if you did not receive the Disclosure Brochure or if you have any questions about the contents of this Brochure Supplement.

Additional information about David C. Morgan is available on the SEC's website at <a href="https://www.adviserinfo.sec.gov">www.adviserinfo.sec.gov</a>.

### **Educational Background and Business Experience - Item 2**

## David C. Morgan

Year of Birth: 2000

Formal Education After High School:

- University of Alabama, B.S., Consumer Sciences with a concentration in Family Financial Planning, 2022
- University of Virginia, Coursework in Foreign Affairs, 2018 to 2019

Business Background for the Previous Five Years:

- The High Net Worth Advisory Group, LLC, Investment Adviser Representative, 05/2022 to Present
- University of Alabama, Full Time Student, 01/2020 to 04/2022
- University of Virginia, Full Time Student, 08/2018 to 12/2019
- Seacrest Country Day School, Full Time Student, 05/2012 to 05/2015

### **Disciplinary Information - Item 3**

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of Mr. Morgan and HNWAG. Mr. Morgan has no history of reportable legal or disciplinary events.

#### **Other Business Activities - Item 4**

Mr. Morgan does not engage in any other business activities.

## <u>Additional Compensation – Item 5</u>

Mr. Morgan does not receive additional compensation or economic benefits from third party sources in connection to his advisory activities.

#### **Supervision - Item 6**

Mr. Morgan is an Investment Adviser Representative for HNWAG. In this capacity, Mr. Morgan is responsible for the monitoring of client portfolios for investment objectives and other account reviews. Mr. Morgan reports directly to David T. Morgan, the Chief Compliance Officer of HNWAG. Mr. Morgan can be reached at the phone number listed on the cover of this Brochure Supplement.

HNWAG has implemented a Code of Ethics and an internal compliance program that guides each Associated Person in meeting their fiduciary obligations to clients. Mr. Morgan adheres to the code of ethics and compliance manual as mandated. Clients may contact as at the phone number listed on the cover of this Brochure Supplement to obtain a copy of the code of ethics.

Additionally, HNWAG is subject to regulatory oversight by various agencies. These agencies require registration by

The High Net Worth Advisory Group, LLC Form ADV Part 2B Brochure Supplement Page 3

HNWAG and its employees, where applicable. As a registered entity, HNWAG is subject to examinations by regulators, which may be announced or unannounced. HNWAG is required to periodically update the information provided to these agencies and to provide various reports regarding firm business and assets under management.

## Requirements for State-Registered Advisers - Item 7

HNWAG is SEC registered; therefore, this item is not applicable.