

USAdvisors Wealth Management, LLC
Form ADV Part 2B – Individual Disclosure Brochure

for

James R. Morton
Investment Advisor Representative
Morton Financial Solutions
405 East Northtown Road
Kirksville, MO 63501
CRD # 1684747



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Updated: June 2024

This brochure supplement provides information about this representative that supplements the USAdvisors Wealth Management brochure. You should have received a copy of that brochure. Please contact USAdvisors Wealth Management if you did not receive USAdvisors Wealth Management's brochure or if you have any questions about the contents of this supplement.

Additional information about this representative is available of the SEC's website at www.adviserinfo.sec.gov.

Item 2. Educational Background and Business Experience

Name: James R. Morton

Born: 1960

Education Background and Professional Designations

Education:

Graduate, Truman State University 1983

Designations / Licensure:

- ChFC: Chartered Financial Consultant: To be a ChFC, one must have:
Completed 8 courses including 2 electives and exams, meet experience Requirements and ethics standards and agree to comply with The American College Code of Ethics and Procedures.
- CLU: Chartered Life Underwriter: To be a CLU one must have:
Completed 8 courses including 2 electives and exams, meet experience Requirements and ethics standards and agree to comply with The American College Code of Ethics and Procedures.
- RFC: Registered Financial Consultant: To be an RFC one must have:
Three years full-time experience as a financial planning practitioner in the field of financial planning or financial planning services.
Required licenses to engage in financial planning profession.
Adherence to a strong Code of Ethics with no suspension or revocation of any professional designations or licenses. Must be in good standing with all licensing bodies and organizations. Complete 40 continuing education credits every 2 years with 4 credits dedicated to ethics.
- LUTCF: Life Underwriter Training Council Fellow: To be a LUTCF one must have:
Member in good standing with NAIFA.
Three eight-week courses.
- Passed the Series 6,7 & 63 examination administered by the NASAA

Business Background

11/2014 to present USAdvisors Wealth Management, LLC, Investment Advisor

6/2024 to present Osaic Wealth Inc., Registered Representative

05/2008 to 6/2024 Securities America Inc., Registered Representative

05/2008 to present Securities America Advisors, Inc.
01/2017 to present Morton Financial Solutions, LLC
05/2008 to 12/2016 Alliant Bank – Alliant Financial Services
03/2009 to present Independent Insurance Agent/Broker
01/2007 to 5/2008 Registered Representative of First Advisors
06/1996 to 01/2007 FFP Advisory Services, Inc.
10/1994 to 01/2007 FFP Securities, Inc.

Item 3. Disciplinary Information

Mr. Morton has no disciplinary history.

Item 4. Other Business Activities

Mr. Morton is a licensed insurance agent and/or broker. While our portfolio management services do not typically include advice about insurance, Mr. Morton, in his capacity as an insurance agent or broker, may recommend the purchase of insurance products to minimize your exposure to identified risks. You are under no obligation to purchase insurance products recommended by Mr. Morton. Mr. Morton will receive commissions from insurance you purchase.

In his separate capacity as a Registered Representative of Osaic Wealth, Inc., Mr. Morton may recommend securities or insurance products offered by them, and may receive the normal commissions if products are purchased through him. Clients are under no obligation to purchase products recommended by Mr. Morton in his capacity as a Registered Representative of Osaic Wealth, Inc. or to purchase products through them.

Neither USAdvisors Wealth Management nor Mr. Morton share in any commissions, 12b-1 fees or other compensation generated from the purchase or sale of securities in investment management accounts.

Item 5. Additional Compensation

In his separate capacity as a Registered Representative and/or an insurance agent or broker, Mr. Morton is eligible to receive incentive awards (including prizes such as trips or bonuses) for recommending certain types of insurance policies or other investment products that he may recommend.

While we endeavor at all times to put the interest of our clients first as part of our

fiduciary duty, the possibility of receiving incentive awards creates a conflict of interest, and may affect his judgment when making recommendations.

Item 6. Supervision

The Chief Compliance Officer of USAdvisors Wealth Management, LLC is responsible for all supervision, and the Investment Committee is responsible formulation and monitoring of investment advice to clients. The Investment Committee will review periodic testing to ensure that client objectives and mandates are being met.

The name of the Chief Compliance Officer is Andrew Beilke, he can be reached at 952-289-0000.

Item 7. Requirements for State-Registered Advisers

Mr. Morton has never been the subject of a bankruptcy petition nor has ever been involved in any of the additional disciplinary events reportable under this item.