Item 1: Cover Page

Morey & Quinn Wealth Partners LLC

Form ADV Part 2A
Investment Adviser Brochure

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September 2026

This Brochure provides information about the qualifications and business practices of Morey & Quinn Wealth Partners ("we," "us," "our"). If you have any questions about the contents of this Brochure, please contact Katie A. Bruno, Partner, Financial Advisor, and Chief Compliance Officer, at (402) 502-9900 or katie@moreyandquinn.com.

Additional information about our Firm is also available at www.adviserinfo.sec.gov. The information in this Brochure has not been approved or verified by the United States Securities and Exchange Commission or by any state securities authority.

We are a registered investment adviser. Please note that use of the term "registered investment advisor" and a description of the Firm and/or our employees as "registered" does not imply a certain level of skill or training. For more information on the qualifications of the Firm and our employees who advise you, we encourage you to review this Brochure and the Brochure Supplement(s).

Item 2: Summary of Material Changes

In this Item of Morey & Quinn Wealth Partners LLC (the "Firm," "we," "us," "ours,") Form ADV 2, we are required to discuss any material changes that have been made to Form ADV since the last Annual Amendment.

Material Changes since the Last Update

Since the filing of our Annual Amendment on March 9, 2026, we have the following material change to report:

- Item 15: Custody was updated to disclose that we maintain Standing Letters of Authorization ("SLOA's") for third-party money movement.

Annual Update

You will receive a summary of any material changes to our Form ADV brochure within 120 days of our fiscal year end. We may also provide updated disclosure information about material changes on a more frequent basis. Any summaries of changes will include the date of the last annual update of the ADV.

The Supplement to our Form ADV Brochure (Form ADV Part 2B) provides you with information regarding our employees that provide investment advice.

Full Brochure Available

Our Form ADV may be requested at any time, without charge by contacting Katie A. Bruno, Partner, Financial Advisor, and Chief Compliance Officer, at (402) 502-9900 or katie@moreyandquinn.com. Additional information about the Firm is also available via the SEC's website at www.adviserinfo.sec.gov. The SEC's website also provides information about any employees affiliated with the Firm who are registered as investment adviser representatives.

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Item 4: Advisory Business

Firm Information

This Disclosure Brochure ("Form ADV Part 2") provides information regarding the qualifications, business practices, and the advisory services provided by Morey & Quinn Wealth Partners LLC (the "Firm," "we," "us," "ours,").

We are a federally registered investment adviser with the U.S. Securities and Exchange Commission ("SEC"). We were founded in 2024 and are owned by Katie A. Bruno, Partner, Financial Advisor, and Chief Compliance Officer, Michael A. Morey, Partner and Financial Advisor, and Pauline J. Quinn, Partner, and Financial Advisor.

Types of Advisory Services

Financial Planning

We offer financial planning services, which may include a review of all aspects of a client's current financial situation, including the following components: cash management, risk management, insurance, education funding, goal setting, retirement planning, estate and charitable giving planning, tax planning, and capital needs planning. Clients understand that when we are engaged to address only certain components, the client's overall financial and investment issues may not be taken into consideration.

We meet with the client to review risk tolerance, financial goals and objectives, and time horizons. Additional meetings may include a review of additional financial information; sources of income, assets owned, existing insurance, liabilities, wills, trusts, business agreements, tax returns, investments, and personal and family obligations.

The financial plan may include both long and short-term considerations, depending upon the individual scenario. Upon completion a plan is presented to the client, and the client is provided with recommendations that are deemed to be compatible with the client's stated goals and objectives. An implementation schedule is reviewed with the client to determine which steps will be pursued, and with whom the steps may be accomplished. The client is under no obligation to utilize the Firm to implement the advice or plan. Clients may choose all or certain components of advice and recommendations and can implement the recommendations through the service providers of their choice.

Wealth Management

We provide continuous advice to clients regarding investment of client funds based on the individual needs of the client. Through personal discussions in which goals and objectives based on a client's particular circumstances are established, we develop a client's personal investment policy and create and manage a portfolio based on that policy. We will manage advisory accounts on a discretionary basis only. Account supervision is guided by the stated objectives of the client (i.e., maximum capital appreciation, growth, income, growth and income, etc.).

We will create a portfolio consisting of one or all of the following: individual equities, bonds, other investment products, no-load or load-waived mutual funds, and ETFs. We will allocate the client's assets among various investments taking into consideration the overall management style selected by the client. Mutual funds will be selected on the basis of any or all of the following criteria: the fund's performance history; the industry sector in which the fund invests; the track record of the fund's manager; the fund's investment objectives; the fund's management style and philosophy; and the fund's management fee structure. Portfolio weighting between funds and market sectors will be determined by each client's individual needs and circumstances.

We may also provide advice about any type of legacy position or investment otherwise held in client portfolios.

Tailored Relationships

We tailor investment advisory services to the individual needs of the client. Our clients are allowed to impose restrictions on the investments in their account. All limitations and restrictions placed on accounts must be presented to us in writing.

Wrap Fee Programs

We typically recommend (several "Wrap Fee" Program(s))" sponsored by broker-dealers. Wrap fee program is one that provides the client with advisory and brokerage execution services for an all-inclusive fee. The client is not charged separate fees for the respective components of the total service.

Certain Wrap Fee Program accounts allow us the discretion to select other investment adviser(s) who provide then manage the portfolio(s) using stocks, bonds, mutual funds, and exchange traded funds. Other Wrap Fee Program Accounts allow us the discretion to develop, implement, and manage portfolio(s) using investment models comprised of stocks, bonds, mutual funds, and exchange traded funds. We receive a portion of the total wrap fee for our investment management services.

The only significant difference between how we manage wrap fee accounts versus other accounts is that wrap fee account trading is executed through a directed broker.

In evaluating Wrap Fee Programs, you should consider that, depending upon the level of the wrap fee charged, the amount of portfolio activity in your account, the broker-dealer's usual commission rates and other factors, the Wrap Fee may be more or less than the aggregate cost of such services if they were provided separately and if we were to negotiate commissions and seek best price and execution of transactions for your client's account. For further information about the investment advisor(s) we recommend, refer to their specific Wrap Fee Program Brochure (Form ADV Brochure, Appendix I).

Fiduciary Statement

We are fiduciaries under the Investment Advisers Act of 1940 and when we provide investment

advice to you regarding your retirement plan account or individual retirement account, we are also fiduciaries within the meaning of Title I of the Employee Retirement Income Security Act, ("ERISA") and/or the Internal Revenue Code, ("IRC"), as applicable, which are laws governing retirement accounts.

We have to act in your best interest and not put our interest ahead of yours. At the same time, the way we make money creates some conflicts with your interests. We must take into consideration each client's objectives and act in the best interests of the client. We are prohibited from engaging in any activity that is in conflict with the interests of the client. We have the following responsibilities when working with a client:

- To render impartial advice;
- To make appropriate recommendations based on the client's needs, financial circumstances, and investment objectives;
- To exercise a high degree of care and diligence to ensure that information is presented in an accurate manner and not in a way to mislead;
- To have a reasonable basis, information, and understanding of the facts in order to provide appropriate recommendations and representations;
- Disclose any material conflict of interest in writing; and
- Treat clients fairly and equitably.

Regulations prohibit us from:

- Employing any device, scheme, or artifice to defraud a client;
- Making any untrue statement of a material fact to a client or omitting to state a material fact when communicating with a client;
- Engaging in any act, practice, or course of business which operates or would operate as fraud or deceit upon a client; or
- Engaging in any manipulative act or practice with a client.

We will act with competence, dignity, integrity, and in an ethical manner, when working with clients. We will use reasonable care and exercise independent professional judgement when conducting investment analysis, making investment recommendations, trading, promoting our services, and engaging in other professional activities.

Assets Under Management

As of December 31, 2025, we manage $369,987,532 in client assets on a discretionary basis, and $3,440,797 on a non-discretionary basis.

Item 5: Fees and Compensation

We base our fees on hourly charges, fixed fees, and/or a percentage of assets under management, described below.

Compensation – Financial Planning
Financial Planning fees will be charged in one of two ways:

- As a fixed fee, typically ranging from $1,000 to $5,000 depending on the nature and complexity of each client's circumstances, or
- On an hourly basis of $250 to $500 per hour.

All financial planning fees are due in arrears upon presentation of the financial plan.

Compensation – Wealth Management Services
Fees are generally billed quarterly in advance based on the amount of assets managed at the beginning of the quarter.

Total Assets Under Management	Annual Fee
Up to $1,000,000	2.00%
$1,000,000-$2,500,000	1.50%
$2,500,000-$5,000,000	1.25%
$5,000,000	1.00%

Calculation and Payment
The annual asset-based fee is generally charged quarterly in advance. RJA deducts asset-based fees from the client's account and sends statements reflecting amounts disbursed from the client's account, including the asset-based fee amount, the value of the assets on which the fee was based and the specific manner in which the fee was calculated.

At account opening, the asset-based fees are billed for the remainder of the current billing period and based on the initial contribution. Upon termination, the client pays an asset-based fee for the period the account was managed prior to notification of termination. If payment was in advance, any unearned fee is refunded.

In no case will more than $1,200 be collected from the client more than 6 months in advance.

Other Fees
There are no additional types of fees or expenses that our clients pay in connection with the delivery of advisory services.

Agreement Terms

Either party may terminate an agreement at any time by notifying the other in writing. If the client made an advance payment, we would refund any unearned portion of the advance payment. If the client made a payment in arrears, we would collect any earned yet unpaid fees.

Cash Balances

Some of your assets may be held as cash and remain uninvested. Holding a portion of your assets in cash and cash alternatives, i.e., money market fund shares, may be based on your desire to have an allocation to cash as an asset class, to support a phased market entrance strategy, to facilitate transaction execution, to have available funds for withdrawal needs or to pay fees or to provide for asset protection during periods of volatile market conditions. Your cash and cash equivalents will be subject to our investment advisory fees unless otherwise agreed upon. You may experience negative performance on the cash portion of your portfolio if the investment advisory fees charged are higher than the returns you receive from your cash.

Retirement Plan Rollover Recommendations

As part of our investment advisory services to our clients, we may recommend that clients roll assets from their employer's retirement plan, such as a 401(k), 457, or ERISA 403(b) account (collectively, a "Plan Account"), to an individual retirement account, such as a SIMPLE IRA, SEP IRA, Traditional IRA, or Roth IRA (collectively, an "IRA Account") that we will advise on the client's behalf. We may also recommend rollovers from IRA Accounts to Plan Accounts, from Plan Accounts to Plan Accounts, and from IRA Accounts to IRA Accounts.

If the client elects to roll the assets to an IRA that is subject to our advisement, we will charge the client an asset-based fee as set forth in the advisory agreement the client executed with our firm. This creates a conflict of interest because it creates a financial incentive for our firm to recommend the rollover to the client (i.e., receipt of additional fee-based compensation). Clients are under no obligation, contractually or otherwise, to complete the rollover. Moreover, if clients do complete the rollover, clients are under no obligation to have the assets in an IRA advised on by our firm. Due to the foregoing conflict of interest, when we make rollover recommendations, we operate under a special rule that requires us to act in our clients' best interests and not put our interests ahead of our clients.'

Under this special rule's provisions, we must:

- meet a professional standard of care when making investment recommendations (give prudent advice);
- never put our financial interests ahead of our clients' when making recommendations (give loyal advice);
- avoid misleading statements about conflicts of interest, fees, and investments;
- follow policies and procedures designed to ensure that we give advice that is in our clients' best interests;
- charge no more than a reasonable fee for our services; and

- give clients basic information about conflicts of interest.

Many employers permit former employees to keep their retirement assets in their company plan. Also, current employees can sometimes move assets out of their company plan before they retire or change jobs. In determining whether to complete the rollover to an IRA, and to the extent the following options are available, clients should consider the costs and benefits of a rollover. Note that an employee will typically have four options in this situation:

1. leaving the funds in the employer's (former employer's) plan;
2. moving the funds to a new employer's retirement plan;
3. cashing out and taking a taxable distribution from the plan; or
4. rolling the funds into an IRA rollover account.

Each of these options has positives and negatives. Because of that, along with the importance of understanding the differences between these types of accounts, we will provide clients with an explanation of the advantages and disadvantages of both account types and document the basis for our belief that the rollover transaction we recommend is in your best interests.

General Information on Compensation and Other Fees

In certain circumstances, fees, account minimums, and payment terms are negotiable depending on client's unique situation – such as the size of family holdings, low-cost basis securities, or certain passively advised investments and pre-existing relationships with clients. Certain clients may pay more or less than others depending on the amount of assets, type of portfolio, or the time involved, the degree of responsibility assumed, complexity of the engagement, special skills needed to solve problems, the application of experience and knowledge of the client's situation.

Our fees are exclusive of brokerage commissions, transaction fees, and other related costs and expenses which shall be incurred by the client. Clients may incur certain charges imposed by custodians, brokers, third party investment and other third parties such as fees charged by managers, custodial fees, deferred sales charges, odd-lot differentials, transfer taxes, wire transfer and electronic fund fees, and other fees and taxes on brokerage accounts and securities transactions. Mutual funds and exchange traded funds also charge internal management fees, which are disclosed in a fund's prospectus.

Such charges, fees and commissions are exclusive of and in addition to our fees, and we shall not receive any portion of these commissions, fees, and costs.

All fees paid to us for investment advisory services are separate and distinct from the fees and expenses charged by mutual funds to their shareholders. These fees and expenses are described in each fund's prospectus. These fees will generally include a management fee, other expenses, and a possible distribution fee. If the fund also imposes sales charges, a client may pay an initial or deferred sales charge.

A client could invest in a mutual fund directly, without our services. In that case, the client would not receive our services, which are designed, among other things, to assist the client in determining which mutual funds are most appropriate to each client's financial condition and objectives. Accordingly, the client should review both the fees charged by the funds and the fees charged by us to fully understand the total amount of fees to be paid by the client and to thereby evaluate the advisory services being provided.

Clients should note that similar advisory services may (or may not) be available from other registered investment advisers for similar or lower fees.

Item 6: Performance-Based Fees and Side-by-Side Management

“Performance-based fees” are fees based on the capital gains or capital appreciation in an account. We do not charge performance-based fees. “Side-by-side management” refers to the practice of managing both accounts that are charged a performance-based fee and accounts that are charged other types of fees, such as asset-based fees and hourly fees. Because we do not charge performance-based fees, we do not engage in side-by-side management.

Item 7: Types of Clients

Types of Clients

We provide services to individuals, high net worth individuals, trusts, estates, charitable organizations, and corporations.

Account Minimums

We have no minimum account size.

Item 8: Methods of Analysis, Investment Strategies and Risk of Loss

Methods of Analysis

We use fundamental analysis in formulating our investment advice and/or managing client assets. Fundamental analysis attempts to measure the intrinsic value of a security by looking at economic and financial factors (including the overall economy, industry conditions, and the financial condition and management of the company itself) to determine if the company is underpriced (indicating it may be a good time to buy) or overpriced (indicating it may be time to sell).

Fundamental analysis does not attempt to anticipate market movements. This presents a potential risk, as the price of a security can move up or down along with the overall market regardless of the economic and financial factors considered in evaluating the stock.

Investment Strategies

Our investment strategies and advice may vary depending upon each client's specific financial situation. As such, we determine investments and allocations based upon your predefined objectives, risk tolerance, time horizon, financial information, liquidity needs, and other various suitability factors. Your restrictions and guidelines may affect the composition of your portfolio. It is important that you notify us immediately with respect to any material changes to your financial circumstances, including for example, a change in your current or expected income level, tax circumstances, or employment status.

Risk of Loss

Investing in securities involves risk of loss that clients should be prepared to bear.

All investments involve the risk of loss, including (among other things) loss of principal, a reduction in earnings (including interest, dividends, and other distributions), and the loss of future earnings. Although we manage assets in a manner consistent with your investment objectives and risk tolerance, there can be no guarantee that our efforts will be successful. You should be prepared to bear the following risks of loss:

- **Interest-rate Risk:** Fluctuations in interest rates may cause investment prices to fluctuate. For example, when interest rates rise, yields on existing bonds become less attractive, causing their market values to decline.
- **Market Risk:** The price of a security, bond, or mutual fund may drop in reaction to tangible and intangible events and conditions. This type of risk is caused by external factors independent of a security's particular underlying circumstances. For example, political, economic, and social conditions may trigger market events.
- **Inflation Risk:** When any type of inflation is present, a dollar next year will not buy as much as a dollar today, because purchasing power is eroding at the rate of inflation.

- **Currency Risk:** Overseas investments are subject to fluctuations in the value of the dollar against the currency of the investment's originating country. This is also referred to as exchange rate risk.
- **Reinvestment Risk:** This is the risk that future proceeds from investments may have to be reinvested at a potentially lower rate of return (i.e., interest rate). This primarily relates to fixed income securities.
- **Business Risk:** These risks are associated with a particular industry or a particular company within an industry. For example, oil-drilling companies depend on finding oil and then refining it, a lengthy process, before they can generate a profit. They carry a higher risk of profitability than an electric company, which generates its income from a steady stream of customers who buy electricity no matter what the economic environment is like.
- **Liquidity Risk:** Liquidity is the ability to readily convert an investment into cash. Generally, assets are more liquid if many traders are interested in a standardized product. For example, Treasury Bills are highly liquid, while real estate properties (i.e., Non-traded REITs and other alternative investments) are not.
- **Financial Risk:** Excessive borrowing to finance a business' operations increases the risk of profitability, because the company must meet the terms of its obligations in good times and bad. During periods of financial stress, the inability to meet loan obligations may result in bankruptcy and/or a declining market value.
- **Cybersecurity Risk:** A breach in cyber security refers to both intentional and unintentional events that may cause an account to lose proprietary information, suffer data corruption, or lose operational capacity. This in turn could cause an account to incur regulatory penalties, reputational damage, and additional compliance costs associated with corrective measures, and/or financial loss.
- **Pandemic Risk:** Large-scale outbreaks of infectious disease can greatly increase morbidity and mortality over a wide geographic area, crossing international boundaries, and causing significant economic, social, and political disruption.
- **Custodial Risk:** This risk is the probability that a party to a transaction will be unable or unwilling to fulfill its contractual obligations either due to technological errors, control failures, malfeasance, or potential regulatory liabilities.

Item 9: Disciplinary Information

We are required to disclose all pertinent facts regarding any legal, regulatory, or disciplinary events that would be material to your evaluation of the Firm or the integrity of our management.

There have never been any legal, regulatory, or disciplinary actions against the Firm or our management persons.

Item 10: Other Financial Industry Activities and Affiliations

Financial Industry Activities

We are not registered as a broker-dealer. We are not registered and do not have an application pending as a securities broker-dealer, futures commission merchant, commodity pool operator, or commodity trading advisor.

Certain of our management persons are registered representatives of a broker-dealer, Cabot Lodge Securities LLC, member FINRA/SIPC. As such, these individuals will be able to effect securities transactions and may receive separate, yet customary, compensation for effecting securities transactions.

We do not have arrangements that are material to our business and clients and investors with a related person who is a broker-dealer, investment company, other investment adviser, financial planning firm, commodity pool operator, commodity trading adviser, futures commission merchant, bank or thrift institution, accounting firm, law firm, insurance company or agency, pension consultant, real estate broker or dealer, or an entity that creates or packages limited liability companies.

Insurance Company or Agency

Certain of our Investment Adviser Representatives may be licensed insurance agents or brokers and may be appointed with several insurance companies. They may earn separate compensation for transactions implemented through various insurance companies. Clients are not obligated to use any company for insurance product purchases and may work with any insurance agent they choose. Insurance compensation will be separate and distinct from our investment advisory fees.

Item 11: Code of Ethics, Participation or Interest in Client Transactions and Personal Trading

Code of Ethics

Our employees must comply with a Code of Ethics and Statement for Insider Trading (the "Code"). The Code describes our high standard of business conduct, and fiduciary duty to our clients. The Code's key provisions include:

- Statement of General Principles
- Policy on and reporting of Personal Securities Transactions
- A prohibition on Insider Trading
- Restrictions on the acceptance of significant gifts
- Procedures to detect and deter misconduct and violations
- Requirement to maintain confidentiality of client information

Our employees must acknowledge the terms of the Code at least annually, and any employee not in compliance with the Code may be subject to termination. We will provide a copy of our Code upon request.

Participation or Interest in Client Transactions – Personal Securities Transactions

Both the Firm and our employees may buy or sell securities identical to those recommended to clients for their personal accounts. The Code, described above, is designed to assure that the personal securities transactions, activities, and interests of the employees of the Firm will not interfere with (i) making decisions in the best interest of clients and (ii) implementing such decisions while, at the same time, allowing employees to invest for their own accounts. Under the Code certain classes of securities, primarily mutual funds, have been designated as exempt transactions, based upon a determination that these would materially not interfere with the best interest of our clients. In addition, the Code requires pre-clearance of many transactions. Nonetheless, because the Code in some circumstances would permit employees to invest in the same securities as clients, there is a possibility that employees might benefit from market activity by a client in a security held by an employee. The Firm may maintain a list of restricted securities that employees may not purchase or sell based upon having (or possibly having) access to inside information. Employee trading is continually monitored under the Code and designed to reasonably prevent conflicts of interest between the Firm and our clients.

Participation or Interest in Client Transactions and Principal/Agency Cross Trades

We do not recommend any securities to our clients in which we have a material financial interest. We do not affect any principal or agency cross securities transactions for client accounts. We also do not cross trades between client accounts.

Participation or Interest in Client Transactions – Aggregation

We, our employees, and their family members may trade in the same securities with client

accounts on an aggregated basis when consistent with our obligation of best execution. In such circumstances, the affiliated and client accounts will share commission costs equally and receive securities at a total average price. We will retain records of the trade order (specifying each participating account) and its allocation, which will be completed prior to the entry of the aggregated order. Completed orders will be allocated as specified in the initial trade order. Partially filled orders will be allocated on a pro rata basis. Any exceptions will be explained on the order.

Item 12: Brokerage Practices

Research and Other Soft Dollar Benefits
We have no written or verbal arrangements whereby we receive soft dollars.

Brokerage for Client Referrals
We do not receive client referrals from broker/dealers.

Client Directed Brokerage
We do not allow directed brokerage accounts.

Directed Brokerage
We generally recommend Raymond James & Associates, Inc., a member of New York Stock Exchange/SIPC, an independent and unaffiliated broker-dealer ("Raymond James"). Raymond James provides us with access to its institutional trading and custody services, which are typically not available to retail investors. These services generally are available to independent investment advisors on an unsolicited basis and are not otherwise contingent upon our commitment to Raymond James for any specific amount of business (assets in custody or trading). Raymond James's services include the execution of securities transactions, custody, research, and access to mutual funds and other investments that are otherwise generally available only to institutional investors or would require a significantly higher minimum initial investment.

For our client accounts maintained there, Raymond James is compensated through commissions or other transaction-related fees for securities trades that are executed through them or that settle into Raymond James accounts. The brokerage commissions and/or transaction fees charged by Raymond James are exclusive of and in addition to our fees.

Directed Brokerage – Other Economic Benefits
We may receive from Raymond James, at no cost to us, professional services, computer software, and related systems support, enabling us to better monitor client accounts maintained at Raymond James. We may receive this support without cost because of the portfolio management services rendered to clients that maintain assets at Raymond James. The support provided may benefit us, but not our clients directly. In fulfilling our duties to our clients, we endeavor at all times to put the interests of our clients first. Clients should be aware, however, that our receipt of economic benefits from a broker-dealer may create a conflict of interest since these benefits may influence our choice of broker-dealer over another broker-dealer that does not furnish similar services, software, and systems support.

The commissions paid by our clients shall comply with our duty to obtain "best execution." However, a client may pay a commission that is higher than another qualified broker-dealer might charge to effect the same transaction where we determine, in good faith, that the commission is reasonable in relation to the value of the brokerage and research services

received. In seeking best execution, the determinative factor is not the lowest possible cost, but whether the transaction represents the best qualitative execution, taking into consideration the full range of a broker-dealer's services, including among others, the value of research provided, execution capability, commission rates, and responsiveness. Consistent with the foregoing, while we will seek competitive rates, we may not necessarily obtain the lowest possible commission rates for client transactions.

Raymond James also makes available to us other products and services that benefit us but may not directly benefit our clients' accounts. Many of these products and services may be used to service all or some substantial number of our accounts, including accounts not maintained at Raymond James.

Raymond James's products and services that assist us in managing and administering clients' accounts include software and other technology that (i) provide access to client account data (such as trade confirmations and account statements); (ii) facilitate trade execution and allocate aggregated trade orders for multiple client accounts; (iii) provide research, pricing and other market data; (iv) facilitate payment of our fees from our clients' accounts; and (v) assist with back-office functions, recordkeeping and client reporting.

Trade Aggregation

We may aggregate trades for multiple accounts. Trade aggregation is the act of trading a large block of a security in a single order. Shares of a purchased security are then allocated to the appropriate accounts in the appropriate proportion. The main purposes of order aggregation are (i) for ease of trading and (ii) to obtain a lower transaction cost associated with trading a larger quantity.

Orders for the same security entered on behalf of more than one client may be aggregated (i.e., blocked or bunched) subject to the aggregation being in the best interests of all participating clients. If the order is filled at different prices during the day, the prices are averaged for the day so that all participating accounts receive the same price. If an order has not been filled completely so that there are not enough shares to allocate among all the clients equally, shares will be allocated in good faith, based on the following considerations: amount of cash in the account, existing asset allocation and industry exposure, risk profile, and type of security. If a partial execution is attained at the end of the trading day, we will generally allocate shares on a pro rata basis but may fill small orders entirely before applying the pro rata allocation. All clients participating in each aggregated order shall receive the average price and subject to minimum ticket charges, pay a pro-rata portion of commissions.

Our allocation procedure seeks to be fair and equitable to all clients with no particular group or client(s) being favored or disfavored over any other clients.

Accounts for us or our employees will not be included in a block trade with client accounts.

Item 13: Review of Accounts

Reviews

We monitor client portfolios as part of an ongoing process, and regular account reviews are generally conducted on a quarterly basis. Reviews could also occur at the time of new deposits, material changes in the client's financial information, changes in economic cycles, at our discretion or as often as the client directs. Reviews entail analyzing securities, sensitivity to overall markets, economic changes, investment results, asset allocation, etc., to ensure the investment strategy and expectations are structured to continue to meet the client's objectives. These reviews are conducted by one of our Investment Advisor Representatives.

Clients are encouraged to discuss their needs, goals, and objectives with us and to inform us of any changes.

Reporting

At least quarterly, the custodian provides clients with an account statement for each client account, which may include individual holdings, cost basis information, deposits, and withdrawals, accrued income, dividends, and performance. We may also provide clients with periodic reports regarding their holdings, allocations, and performance.

Financial Planning – Reviews and Reporting

The initial financial plan is included as a component of the financial planning service. Clients may receive updated financial plans for a separate fee.

Item 14: Client Referrals and Other Compensation

Other Compensation – Brokerage Arrangements

See disclosure in Item 12 regarding compensation, including economic benefits received in connection with giving advice to clients.

Compensation – Client Referrals

We have been fortunate to receive many client referrals over the years. The referrals came from current clients, estate planning attorneys, accountants, employees, personal friends of employees and other similar sources. We do not compensate referring parties for these referrals.

Item 15: Custody

Custody – Fee Debiting

Clients may authorize us (in the client agreement) to debit fees directly from their account at the broker dealer, bank, or other qualified custodian ("custodian"). The custodian is advised in writing of the limitation of our access to the account. The custodian sends a statement to the client, at least quarterly, indicating all amounts disbursed from the account including the amount of advisory fees paid directly to the Firm.

Custody – Account Statements

Clients receive at least quarterly statements from the custodian that holds and maintains client's investment assets. Clients are urged to carefully review such statements and compare such official custodial records to the reports that we provide. Our reports may vary from custodial statements based on accounting procedures, reporting dates, or valuation methodologies of certain securities.

Custody – First Party Money Transfers

Clients may provide us with written ongoing authorization to wire money between the client's accounts held with the custodian directly to an outside financial institution (i.e., a client's bank account). A copy of this authorization is provided to the custodian. The authorization includes the client's account number(s) at the outside financial institution(s) as required.

Custody – Third Party Money Transfers

Our Firm is deemed to have custody of client funds or securities when a client authorizes transfers from their account to a third party through a Standing Letter of Authorization ("SLOA") and permits our Firm to direct the amount or timing of those transfers. The SEC has established conditions intended to protect client assets in these situations, and our Firm complies with those requirements.

Item 16: Investment Discretion

We may accept limited power of attorney to act on a discretionary basis on behalf of clients. A limited power of attorney allows us to execute trades on behalf of clients. When such limited powers exist between the Firm and the client, we have the authority to determine, without obtaining specific client consent, both the amount and type of securities to be bought to satisfy client account objectives.

If we have not been given discretionary authority, we consult with the client prior to each trade.

Item 17: Voting Client Securities

Proxy Voting

We do not have any authority to and do not vote proxies on behalf of clients, nor do we make any express or implied recommendation with respect to voting proxies. Clients retain the sole responsibility for receiving and voting proxies that they receive directly from either their custodian or transfer agents. Clients may contact us for information about proxy voting.

Item 18: Financial Information

We have no financial commitments that impair our ability to meet contractual and fiduciary commitments to clients and we have not been the subject of a bankruptcy proceeding.

We do not require prepayment of fees of both more than $1,200 per client, **and** more than six months in advance; and therefore, we are not required to provide a balance sheet to clients.

We have not ever filed a bankruptcy petition.

Morey & Quinn Wealth Partners LLC

Form ADV Part 2B
Investment Adviser Brochure Supplement

11225 Davenport St, Ste 109
Omaha NE, 68154
(402) 502-9900
www.moreyandquinn.com

Michael A. Morey

September 2026

This Brochure provides information about the qualifications and business practices of Morey & Quinn Wealth Partners ("we," "us," "our"). If you have any questions about the contents of this Brochure, please contact Katie A. Bruno, Partner, Financial Advisor, and Chief Compliance Officer, at (402) 502-9900 or katie@moreyandquinn.com.

Additional information about our employee(s) referenced above is also available on the SEC's website at www.adviserinfo.sec.gov. You may search this site using a unique identifying number, known as a CRD number for each employee.

Item 2: Educational Background and Business Experience

We generally require that employees involved in making investment decisions and providing investment advice have a college degree and/or significant experience in the investment management or financial services industries.

Michael A. Morey Born 1979
CRD #: 4993325

Business Background:

Morey & Quinn Wealth Partners LLC 2018 to Present
Partner and Financial Advisor

Cabot Lodge Securities LLC 2024 to Present
Registered Representative

Raymond James Financial Services Advisors Inc. 2014 to 2024
Investment Advisor Representative

Raymond James Financial Services, Inc. 2005 to 2024
Financial Advisor

Morey-Voorhees Financial Services 2005 to 2018
Investment Advisor Representative

Formal Education after High School:

University of Nebraska at Omaha
Business *(Attended)*

University of Wyoming
Sociology *(Attended)*

Item 3: Disciplinary Information

Michael A. Morey has not been involved in any activities resulting in a disciplinary disclosure.

Item 4: Other Business Activities

Michael A. Morey is a Registered Representative with Cabot Lodge Securities LLC. In such a capacity, he may offer securities and receive normal and customary commissions as a result of securities transactions. This presents a conflict of interest to the extent that he recommends that a client invest in a security which results in a commission being paid to him.

Michael A. Morey is a licensed insurance agent through numerous insurance companies. In such

a capacity, he may offer insurance products and receive normal and customary commissions as a result of such a purchase. This presents a conflict of interest to the extent that he recommends the purchase of an insurance product which results in a commission being paid to him as an insurance agent.

Michael A. Morey participates in educational seminars on investment related topics. This activity does not comprise 10% or more of his time, or income, and does not pose a conflict of interest with clients.

Item 5: Additional Compensation

Michael A. Morey does not receive any economic benefit outside of regular salaries or bonuses related to amount of sales, client referrals, or new accounts.

Item 6: Supervision

The Firm maintains a supervisory structure designed to oversee the advisory activities of its investment adviser representatives and other supervised persons. Day-to-day supervisory responsibilities, including reviewing client accounts, investment recommendations, and client communications, and ensuring adherence to the Firm's policies and procedures, are performed by designated supervisory and compliance personnel.

The Firm's partners, Katie A. Bruno, Michael A. Morey, and Pauline J. Quinn, retain ultimate responsibility for the oversight of the Firm's advisory activities and compliance program. The partners regularly review compliance matters and advisory activities to help ensure that the Firm's fiduciary obligations and regulatory requirements are met.

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Pauline J. Quinn

September 2026

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Additional information about our employee(s) referenced above is also available on the SEC's website at www.adviserinfo.sec.gov. You may search this site using a unique identifying number, known as a CRD number for each employee.

Item 2: Educational Background and Business Experience

We generally require that employees involved in making investment decisions and providing investment advice have a college degree and/or significant experience in the investment management or financial services industries.

Pauline J. Quinn Born 1958
CRD #: 2374597

Business Background:

Morey & Quinn Wealth Partners LLC 2018 to Present
Partner and Financial Advisor

Cabot Lodge Securities LLC 2024 to 2025
Registered Representative

Raymond James Financial Services Advisors Inc. 2014 to 2024
Investment Advisor Representative

Raymond James Financial Services, Inc. 2014 to 2024
Financial Advisor

P J Quinn Wealth Advisors 2014 to 2018
Independent Contractor

FSB Premier Wealth Management, Inc. 2009 to 2014
Registered Representative and Registered Investment Advisor

Formal Education after High School:

Creighton University
Master of Investment Management and Financial Analysis

Creighton University
Bachelor of Business Communication and Business

Item 3: Disciplinary Information

Pauline J. Quinn has never been involved in any activities resulting in a disciplinary disclosure.

Item 4: Other Business Activities

Pauline J. Quinn is a licensed insurance agent through numerous insurance companies. In such a capacity, she may offer insurance products and receive normal and customary commissions as a result of such a purchase. This presents a conflict of interest to the extent that she

recommends the purchase of an insurance product which results in a commission being paid to her as an insurance agent.

Item 5: Additional Compensation

Pauline J. Quinn does not receive any economic benefit outside of regular salaries or bonuses related to amount of sales, client referrals, or new accounts.

Item 6: Supervision

The Firm maintains a supervisory structure designed to oversee the advisory activities of its investment adviser representatives and other supervised persons. Day-to-day supervisory responsibilities, including reviewing client accounts, investment recommendations, and client communications, and ensuring adherence to the Firm's policies and procedures, are performed by designated supervisory and compliance personnel.

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Katie A. Bruno

September 2026

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Additional information about our employee(s) referenced above is also available on the SEC's website at www.adviserinfo.sec.gov. You may search this site using a unique identifying number, known as a CRD number for each employee.

Item 2: Educational Background and Business Experience

We generally require that employees involved in making investment decisions and providing investment advice have a college degree and/or significant experience in the investment management or financial services industries.

Katie A. Bruno Born 1993
CRD #: 6182203

Business Background:

Morey & Quinn Wealth Partners LLC 2018 to Present
Partner, Financial Advisor, and Chief Compliance Officer

Creighton University 2022 to Present
Adjunct Instructor

Raymond James Financial Services Advisors Inc. 2015 to 2024
Investment Advisor Representative

Raymond James and Associates 2016 to 2018
Transition Consultant

Raymond James Financial Services 2014 to 2024
Financial Advisor

CenterPoint Financial Group 2013 to 2015
Paraplanner and Registered Client Service Assistant

Formal Education after High School:

Creighton University
Master of Investment Management and Financial Analysis

Creighton University
Bachelor of Science in Business Administration

Professional Designations:

CERTIFIED FINANCIAL PLANNER™ (CFP®)
CDFA® – Certified Divorce Financial Analyst®

Professional Certifications

Katie A. Bruno maintains professional designations, which requires the following minimum requirements:

CERTIFIED FINANCIAL PLANNER™ (CFP®)	
Issued By	Certified Financial Planner Board of Standards, Inc.
Prerequisites	Candidate must meet the following requirements: • A bachelor's degree (or higher) from an accredited college or university, and • 3 years of full-time personal financial planning experience
Education Requirements	Candidate must complete a CFP®-board registered program, or hold one of the following: • CPA • ChFC • Chartered Life Underwriter (CLU) • CFA • Ph.D. in business or economics • Doctor of Business Administration • Attorney's License
Exam Type	CFP® Certification Examination
Continuing Education Requirements	30 hours every 2 years

CDFA® – Certified Divorce Financial Analyst®	
Issued By	The Institute for Divorce Financial Analysts
Prerequisites	Candidate must have a bachelor's degree with three years of on-the job experience or, if no bachelor's degree, five years of relevant experience
Education Requirements	Self-study program or online courses
Exam Type	Proctored final designation exam
Continuing Education Requirements	30 divorce-related hours every two years

Item 3: Disciplinary Information

Katie A. Bruno has never been involved in any activities resulting in a disciplinary disclosure.

Item 4: Other Business Activities

Katie A. Bruno is a licensed insurance agent through numerous insurance companies. In such a capacity, she may offer insurance products and receive normal and customary commissions as a result of such a purchase. This presents a conflict of interest to the extent that she recommends the purchase of an insurance product which results in a commission being paid to her as an insurance agent.

Item 5: Additional Compensation

Katie A. Bruno does not receive any economic benefit outside of regular salaries or bonuses related to amount of sales, client referrals, or new accounts.

Item 6: Supervision

The Firm maintains a supervisory structure designed to oversee the advisory activities of its investment adviser representatives and other supervised persons. Day-to-day supervisory responsibilities, including reviewing client accounts, investment recommendations, and client communications, and ensuring adherence to the Firm's policies and procedures, are performed by designated supervisory and compliance personnel.

The Firm's partners, Katie A. Bruno, Michael A. Morey, and Pauline J. Quinn, retain ultimate responsibility for the oversight of the Firm's advisory activities and compliance program. The partners regularly review compliance matters and advisory activities to help ensure that the Firm's fiduciary obligations and regulatory requirements are met.