

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

*Additional information about Brandon Lloyd is also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).*

# **Mountain View Wealth Management LLC**

## **Form ADV Part 2B – Individual Disclosure Brochure**

*for*

**Brandon Lloyd**

Personal CRD Number: 6141531

Investment Adviser Representative

Mountain View Wealth Management LLC

550 Hospital Dr

Warrenton, VA 20186

(540) 219-8462

[blloyd@mvwmlc.com](mailto:blloyd@mvwmlc.com)

UPDATED: 02/16/2018

## Item 2: Educational Background and Business Experience

**Name:** Brandon Lloyd      **Born:** 1987

### Educational Background and Professional Designations:

#### Education:

BS Business, James Madison - 2010

#### Business Background:

02/2017 - Present	Managing Member & CCO Mountain View Wealth Management LLC
05/2011 - Present	Financial Advisor Wells Fargo Advisors, LLC
08/2010 - 05/2011	Advisor Sizemore Group
03/2007 - 05/2010	James Madison

## Item 3: Disciplinary Information

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

## Item 4: Other Business Activities

Brandon Reed Lloyd is an independent licensed insurance agent, and from time to time, will offer clients advice or products from those activities. Clients should be aware that these services pay a commission or other compensation and involve a conflict of interest, as commissionable products conflict with the fiduciary duties of a registered investment adviser. MVWM always acts in the best interest of the client; including the sale of commissionable products to advisory clients. Clients are in no way required to utilize the services of any representative of MVWM in

connection with such individual's activities outside of MVWM. Brandon Reed Lloyd spends 25 hours a month on this activity.

### **Item 5: Additional Compensation**

Brandon Lloyd does not receive any economic benefit from any person, company, or organization, other than Mountain View Wealth Management LLC in exchange for providing clients advisory services through Mountain View Wealth Management LLC.

### **Item 6: Supervision**

As the Chief Compliance Officer of Mountain View Wealth Management LLC, Brandon Lloyd supervises all activities of the firm. Brandon Lloyd's contact information is on the cover page of this disclosure document. Brandon Lloyd adheres to applicable regulatory requirements, together with all policies and procedures outlined in the firm's code of ethics and compliance manual.

## Item 7: Requirements For State Registered Advisers

*This disclosure is required by state securities authorities and is provided for your use in evaluating this investment advisor representative's suitability.*

- A. Brandon Lloyd has NOT been involved in any of the events listed below.
1. An award or otherwise being found liable in an arbitration claim alleging damages in excess of \$2,500, involving any of the following:
    - a) an investment or an investment-related business or activity;
    - b) fraud, false statement(s), or omissions;
    - c) theft, embezzlement, or other wrongful taking of property;
    - d) bribery, forgery, counterfeiting, or extortion; or
    - e) dishonest, unfair, or unethical practices.
  2. An award or otherwise being found liable in a civil, self-regulatory organization, or administrative proceeding involving any of the following:
    - a) an investment or an investment-related business or activity;
    - b) fraud, false statement(s), or omissions;
    - c) theft, embezzlement, or other wrongful taking of property;
    - d) bribery, forgery, counterfeiting, or extortion; or
    - e) dishonest, unfair, or unethical practices.
- B. Brandon Lloyd has NOT been the subject of a bankruptcy petition in the past ten years.