Colin Gorman, CPA, PFS, CVA, CCIFP

EGP Wealth Management, LLC

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North Little Rock, AR 72114

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FORM ADV PART

2B
BROCHURE SUPPLEMENT

This brochure supplement provides information about Colin Gorman that supplements the EGP Wealth Management, LLC brochure. You should have received a copy of that brochure. Contact us at 501-320-1021 if you did not receive EGP Wealth Management, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Colin Gorman (CRD # 4877151) is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Colin Gorman, CPA, PFS, CVA, CCIFP
Year of Birth: 1978
Formal Education After High School:

- Hendrix College; Conway, AR
    - Bachelor of Arts in Economics & Business, 2000
    - Master of Arts in Accounting, 2001

Business Background:

- EGP Wealth Management, LLC, Investment Adviser Representative, 10/2018 – Present
- EGP, PLLC, CPA/Managing Partner, 07/01/2015 - Present
- EGP Wealth Management, LLC, Partner, 07/2014 - Present
- 1st Global Advisors Inc, Investment Adviser Representative, 09/2014 - 10/2018
- 1st Global Capital Corp, Registered Representative, 09/2014 - 10/2018
- EGP, PLLC, CPA/Partner, 01/2011 - 07/01/2015
- H.D. Vest Advisory Services, Advisory Representative, 03/2005 - 09/2014
- H.D. Vest Investment Services, Registered Representative, 09/2004 - 09/2014
- Jerry, Gorman, & Associates, CPA, 11/2009 - 12/2010
- Ferguson Cobb and Assoc, CPA, 12/2001 - 10/2009
- USMC Reserve, Sergent, 07/1997 - 10/2003

Certifications: **CPA, PFS, CVA, CCIFP**

Certified Public Accountant (CPA)
CPA's are licensed and regulated by their state boards of accountancy. While state laws and regulations vary, the education, experience and testing requirements for licensure as a CPA generally include minimum college education (typically 150 credit hours with at least a baccalaureate degree and a concentration in accounting), minimum experience levels (most states require at least one year of experience providing services that involve the use of accounting, attest, compilation, management advisory, financial advisory, tax or consulting skills, all of which must be achieved under the supervision of or verification by a CPA), and successful passage of the Uniform CPA Examination. In order to maintain a CPA license, states generally require the completion of 40 hours of continuing professional education (CPE) each year (or 80 hours over a two year period or 120 hours over a three year period). Additionally, all American Institute of Certified Public Accountants (AICPA) members are required to follow a rigorous *Code of Professional Conduct* which requires that they act with integrity, objectivity, due care, competence, fully disclose any conflicts of interest (and obtain client consent if a conflict exists), maintain client confidentiality, disclose to the client any commission or referral fees, and serve the public interest when providing financial services. The vast majority of state boards of accountancy have adopted the AICPA's *Code of Professional Conduct* within their state accountancy laws or have created their own.

Personal Financial Specialist (PFS) - This designation is issued by the American Institute of Certified Public Accountants (AICPA) and is granted to individuals who must meet all of the following prerequisites: a member of the AICPA; hold an unrevoked CPA certificate issued by a state authority; earn at least 100 points under the PFS point system; and have substantial business experience in personal financial planning related services. The candidate is required to obtain personal financial planning specific education in addition to holding a valid CPA. The candidate must take a final certification examination (proctored by the AICPA) and once issued the individual must undergo Continuing Education in the form of 60 PFS points in personal financial planning experience as well as qualified 'life-long learning' activities every three years.

Certified Valuation Analyst (CVA) - The designation of Certified Valuation Analyst (CVA) is a professional designation awarded by the National Association of Certified Valuators and Analysts (NACVA) to business valuation professionals. Candidates must hold a business degree, have sufficient work experience in business valuation, submit business and personal references and recommendations, be members in good standing of NACVA and pass the CVA exam. Every three years, CVA professionals must complete 36 hours of continuing professional education to maintain the designation.

Certified Construction Industry Financial Professional (CCIFP) - The Certified Construction Industry Financial Professional (CCIFP) is a professional certification accredited by the American National Standards Institute. Candidates must have voluntarily met the required certification criteria with regard to eduction, experience, and a demonstrated understanding of the industry's body of knowlege. A CCIFP values and maintains the highest possible standards of knowledge, competence and ethical behavior-as high as any other profession on which businesses and the public rely. The ICCIFP requires that each active CCIFP complete 72 hours of continuing education triennially to be eligible for renewal of their certification.

Item 3 Disciplinary Information

Form ADV Part 2B requires disclosure of certain criminal or civil actions, administrative proceedings, and self-regulatory organization proceedings, as well as certain other proceedings related to suspension or revocation of a professional attainment, designation, or license. Mr. Colin Gorman has no required disclosures under this item.

Item 4 Other Business Activities

Colin Gorman is a Partner and certified public accountant ("CPA") with EGP, PLLC, a certified public accounting firm. Clients of our firm may also be clients of EGP, PLLC. The services provided and compensation received by Mr. Gorman and EGP, PLLC for accounting related activities are separate and distinct from any fees paid for advisory services provided by our firm.

Mr. Gorman is also Partner of EGP Holdings, LLC, a commercial real estate rental company. Mr. Gorman's duties as the Partner of EGP Holdings, LLC do not create a conflict of interest to his provision of advisory services through EGP Wealth Management, LLC. Mr. Gorman is also Managing Member of CFG Holdings, LLC, a holding company. Mr. Gorman's duties as the Managing Member of CFG Holdings, LLC do not create a conflict of interest to his provision of advisory services through EGP Wealth Management, LLC.

Mr. Gorman serves as director of Bank of Little Rock, devoting five hours monthly during trading hours, none outside, and earning about two percent of annual compensation from this role.

Item 5 Additional Compensation

Refer to the *Other Business Activities* section above for disclosures on Mr. Gorman's receipt of additional compensation as a result of his other business activities.

Also, refer to the *Fees and Compensation*, *Client Referrals and Other Compensation, and Other Financial Industry Activities and Affiliations* section(s) of EGP Wealth Management, LLC's firm brochure for additional disclosures on this topic.

Item 6 Supervision

In the supervision of our associated persons, advice provided is limited based on the restrictions set by EGP Wealth Management, LLC, and by internal decisions as to the types of investments that may be included in client portfolios. We conduct periodic reviews of client holdings and documented suitability information to provide reasonable assurance that the advice provided remains aligned with each client's stated investment objectives and with our internal guidelines.

Joe Kersey, Chief Compliance Officer, supervises the advisory activities for our firm.

Supervisor phone number: 501-320-1021

Item 7 Requirements for State Registered Advisers

Colin Gorman does not have any reportable arbitration claims, has not been found liable in a reportable civil, self-regulatory organization or administrative proceeding, and has not been the subject of a bankruptcy petition.