The Morgan Group, Inc.
Kurt Morgan, Registered Investment Advisor
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Part 2B of Form ADV: Firm Brochure Supplement

This brochure supplement provides information about Kurt Morgan that supplements The Morgan Group, Inc. brochure. You should have received a copy of that brochure. Please contact Kurt Morgan if you did not receive the firm's brochure or if you have any questions about the contents of this supplement.

Additional information about Kurt Morgan is available on FINRA's website at www.Brokercheck.FINRA.org.

'Registered Investment Advisor' title requires specific industry licensing requirement, rather than a certain level of skill or training.

Item 2 – Educational Background and Business Experiences: Kurt Morgan

The title of 'Registered Investment Advisor' (RIA) requires specific industry licensing requirements rather than a certain level of skill or training. Following is a listing of Kurt's education and business background.

Name: Kurt E. Morgan – age 54
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Education Background

School	City, State	Graduated	Degree / Major
Lincoln High	Portland, OR	1981	None
Oregon State University	Corvallis, OR	1986	Bachelor Science Business Management

Business Background

Name	Location	Type	Position	Start/End Date
The Morgan Group, Inc.	Portland, OR	RIA	Owner	12/2002 – Present
Triad Advisors, LLC	Norcross, GA	Broker/Dealer	Registered Rep.	05/2001 – Present
Desert River Capital LLC	Phoenix, AZ	Real Estate	Co-Member	06/2007 – 03/2017
Domination Fitness LLC	Beaverton, OR	Fitness Gym	Co-Member	10/2010 – 03/2017
ViSalus Sciences	Troy, MI	Health/Fitness	Promoter	02-2012 – 03/2017
Morgan Advisors, Inc.	Carefree, AZ	RIA	Owner	12/2011 – 11/2014
Amplitude Media LLC	Portland, OR	Brand Develop.	CFO	01/2009 – 12/2009
Advisory Associates	Salem, OR	RIA	Salesperson	03/2001 – 02/2006
New Hope Financial Svcs.	Beaverton, OR	Insurance	Salesperson	08/1997 – 12/2002
Walnut Street Securities	Sioux Falls, SD	Broker/Dealer	Registered Rep.	01/1992 – 05/2001
Building Tech Bookstore	Beaverton, OR	Bookstore	VP Marketing	04/1991 – 06/2000
1st American Nat'l. Secur.	Duluth, GA	Broker/Dealer	Registered Rep.	09/1986 – 01/1992

Examinations / Professional Designations

Name	ExamType	Jurisdiction	Since
Insurance	Life	State of Oregon	09/1986
Insurance	Health	State of Oregon	04/2006
Insurance	Variable	State of Oregon	04/2006
Blue Sky	Series 63	FINRA	11/1986
Variable Contracts	Series 6	FINRA	11/1986
Investment Advisor	Series 65	FINRA	04/2002

Item 3 – Disciplinary Information

There are no disciplinary events or information to report.

Item 4 – Other Business Activities

We are affiliated with several financial-related companies:

Triad Advisors, LLC

Kurt Morgan is a licensed representative with Triad Advisors, LLC, a broker-dealer. The Morgan Group, Inc. is not a subsidiary or affiliate of Triad Advisors, LLC. Securities activities are supervised from a Triad office at 5155 Peachtree Parkway, Suite #3220, Norcross, GA 30092-6538, (770) 840-0363.

Accounting & Legal

In the overall planning process, it is common for Clients to need outside legal counsel in creating or reviewing estate planning documents such as wills, trusts, medical directives, powers of attorney and other concepts. We believe this work is instrumental in establishing a strong foundation for a global financial plan and future.

For those Clients who need such legal counsel as part of the planning process (and are interested), The Morgan Group, Inc. has established a relationship with Bob Kabacy of Kell, Alterman & Runstein, LLP, attorneys – in Portland, Oregon. The relationship allows Clients to address their legal planning needs as part of their financial planning process and implementation of the plans as we work toward achieving Client goals. We recognize and offer Clients the choice of their own legal counsel but offer Bob Kabacy's services based on a high level of quality we want to deliver. The choice of legal counsel, however, is always up to the Client. This arrangement is an optional service for Client's convenience. Client is under no obligation to use this service.

Bob's services may include the initial review of existing planning documents, if any, estate plan design, creation of appropriate documents and analysis related to how the legal plan matches the Client goals when considering the Client's financial plan with our help. Tax matters may also be taken into account. If a plan necessitates more complex planning, separate fee arrangements will be discussed in advance of any planning.

Bob does not provide financial advice or services and we do not provide legal advice or services but together, we can develop an appropriate plan meeting the needs of our Clients. Part of the service also allows at least annual reviews with Bob and us to make sure the Client's plan is up to date and on the right track.

To simplify the process, The Morgan Group will pay for Bob's services as part of the overall fees paid to The Morgan Group. Bob Kabacy and Kell, Alterman & Runstein, LLP do not share fees in any manner and even though The Morgan Group pays Kell, Alterman & Runstein, LLP, the Client would be a Client of Kell, Alterman & Runstein, LLP who provides independent advice. The Morgan Group simply acts as a pay agent for the financial aspect of the relationship. Again, The Morgan Group does not receive any portion of Kell, Alterman & Runstein, LLP's fees nor does it provide legal counsel. A fee schedule of our fees as well as what we pay to Kell, Alterman & Runstein, LLP is provided prior to any engagement. If you have any questions, please do not hesitate to ask.

Occasionally we also refer Clients to other various legal & accounting firms – in an effort to ensure that this aspect of their financial plan is implemented as well. We are not Attorneys or CPA's – and do not present ourselves as such. We do find that having a short list of trusted professionals in these areas can bring much added value to the Client's financial lives.

We do not receive any 'kick-backs' or compensation for making these referrals, nor are our Clients obligated to use their services. We are just as able to work alongside our Clients' existing professionals. Our overall intent is that the Clients' needs are being served.

Insurance

The Morgan Group, Inc. is a licensed life & health insurance agency in the State of Oregon, and may provide Clients with appropriate life, health, disability, long term care or annuity products. Kurt Morgan is a licensed agent of The Morgan Group, Inc. Compensation for insurance transactions is typically in the form of commissions paid by the insurance company itself. Clients are under no obligation to effect insurance transactions through us. Our overall intent is that the Clients' needs are being served.

Item 5 – Additional Compensation

Kurt Morgan does not receive an economic benefit from others for providing advisory services to Clients.

Item 6 – Supervision

Kurt Morgan's business activities are supervised from the Triad Advisors, LLC office at 5155 Peachtree Parkway, Suite #3220, Norcross, GA 30092-6538, (770) 840-0363.

Item 7 – Requirements for State-Registered Advisers

Kurt Morgan has not been involved in any of the events listed below which would require a response.

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.
3) Having been the subject of a bankruptcy petition.