



ADV PART 2B BROCHURE

GREG HAYES, AIF®

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D/B/A

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JULY 2025

This Form ADV 2B ("Brochure Supplement") provides information about the background and qualifications of Greg Hayes (CRD #6588892). The information in this brochure supplements the Part 2A brochure of Apella Capital, LLC d/b/a Apella Wealth (hereinafter "Apella" or "firm"), which you should have received a copy of. Please contact our Chief Compliance Officer at (860) 785-2260 or trichards@apellawealth.com if you did not receive Apella's Part 2A brochure or have any questions about the contents of this supplement. Additional information about Greg Hayes is available on the SEC's website at www.adviserinfo.sec.gov.

ITEM 2 – EDUCATIONAL BACKGROUND & BUSINESS EXPERIENCE

GREG HAYES, AIF®

- CRD #: 6588892
- YEAR OF BIRTH: 1977

EDUCATIONAL BACKGROUND:

- 1999: Loras College; B.A., Finance

BUSINESS BACKGROUND:

- 2025 – Present: Apella Wealth; Senior Financial Advisor
- 2015 – 2025: Iron Horse Management, LLC; Director of Financial Planning
- 2011 – 2015: Midwest Heritage Bank; Bank Manager
- 2003 – 2011: Wells Fargo; Banker

PROFESSIONAL DESIGNATIONS:

- ACCREDITED INVESTMENT FIDUCIARY (AIF®)

ACCREDITED INVESTMENT FIDUCIARY (“AIF®”) DESIGNATION MINIMUM QUALIFICATION

The Accredited Investment Fiduciary designation is currently offered and recognized by the Center for Fiduciary Studies. To obtain this designation, a candidate must meet a point-based threshold based on a combination of education, relevant industry experience, or professional development. In addition, a candidate must complete either a web-based or a capstone program, complete a proctored closed book final certification exam, and complete at least 6 hours of continuing education requirements per year.

ITEM 3: DISCIPLINARY INFORMATION

Registered investment advisers must disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice.

Greg Hayes has no history of any legal or disciplinary events deemed material to a client’s consideration of Greg Hayes to act as their investment adviser representative. FINRA’s BrokerCheck® system and the Investment Adviser Public Disclosure system provide additional information regarding the registration and disciplinary history of Greg Hayes. Please visit FINRA’s BrokerCheck® system at <https://brokercheck.finra.org> or the IAPD system at www.adviserinfo.sec.gov for additional information.

ITEM 4: OTHER BUSINESS ACTIVITIES

Greg Hayes does not engage in any other investment-related business or occupation outside of their role with Apella.

ITEM 5: ADDITIONAL COMPENSATION

Greg Hayes does not receive any economic benefit outside of the salaries and bonuses described in Item 4 of this brochure or on Form ADV Part 2A Items 10 and 12.

ITEM 6: SUPERVISION

Greg Hayes is supervised by Dennis Markway, Regional Director. The Regional Director is responsible for overseeing the day-to-day advisory activities conducted by Greg Hayes. The Regional Director conducts periodic reviews of the IAR’s advisory work to ensure it is consistent with applicable regulatory requirements and the firm’s compliance program. Dennis Markway can be reached at 515.779.6250.

Ultimate supervisory authority and responsibility for compliance matters rests with the firm’s Chief Compliance Officer (CCO), Timothy Richards, who monitors the overall effectiveness of the firm’s supervisory structure. The CCO may review the IAR’s activities as part of the firm’s broader compliance testing program, including reviews of client files, trade activity, and communications, as warranted.