



FORM ADV PART 2B: BROCHURE SUPPLEMENT

# Zachary Aaron Agenbroad

INVESTMENT ADVISOR REPRESENTATIVE

**GODSEY & GIBB WEALTH MANAGEMENT**

6806 Paragon Place, Suite 230  
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(804) 285-7333

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This Form ADV Part 2B (“Brochure Supplement”) provides information about the background and qualifications of Zachary Agenbroad (CRD# 7871909) that supplements the Godsey & Gibb Wealth Management (CRD# 105650) Form ADV Part 2A Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of this Brochure Supplement, please contact us at (804) 285-7333 or [compliance@godseyandgibb.com](mailto:compliance@godseyandgibb.com).

Additional information about Zachary Agenbroad is available on the SEC’s Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching their full name or individual CRD number.

**ITEM 2 – EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE**

**EDUCATION**

Hampton University, B.S. in Economics, 2023

**BUSINESS EXPERIENCE**

Godsey & Gibb Wealth Management   Associate Portfolio Manager	02/2024 to Present
Bloomberg   Economics Analyst Intern	06/2023 to 08/2023
Hampton University Student Managed Investment Fund   President	08/2021 to 05/2023

**ITEM 3 – DISCIPLINARY INFORMATION**

Zachary Agenbroad has no reportable disciplinary history.

**ITEM 4 – OTHER BUSINESS ACTIVITIES**

Zachary Agenbroad is not actively engaged in any other investment-related business activities other than providing advisory services through Godsey & Gibb Wealth Management.

**ITEM 5 – ADDITIONAL COMPENSATION**

Zachary Agenbroad does not receive any economic benefit from any person, or entity for providing advisory services.

**ITEM 6 – SUPERVISION**

Zachary Agenbroad is supervised by Michael Reilly Gibb, President & CEO of Godsey & Gibb Wealth Management who can be reached at 804-285-7333. Zachary Agenbroad is bound by and adheres to Godsey & Gibb Wealth Management’s established written Code of Ethics and Policies & Procedures manual for advice the supervised person provides to clients.



FORM ADV PART 2B: BROCHURE SUPPLEMENT

# Jacob Jerome Bellinger II

INVESTMENT ADVISOR REPRESENTATIVE

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This Form ADV Part 2B (“Brochure Supplement”) provides information about the background and qualifications of Jacob Bellinger II (CRD# 7678556) that supplements the Godsey & Gibb Wealth Management (CRD# 105650) Form ADV Part 2A Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of this Brochure Supplement, please contact us at (804) 285-7333 or [compliance@godseyandgibb.com](mailto:compliance@godseyandgibb.com).

Additional information about Jacob Bellinger II is available on the SEC's Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching their full name or individual CRD number.

**ITEM 2 – EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE**

**EDUCATION**

Clafin University, B.S. in Business Administration, 2018

**BUSINESS EXPERIENCE**

Godsey & Gibb Wealth Management | Associate Portfolio Manager

11/2024 to Present

Morris Financial Concepts | Investment Operations Assistant

02/2022 to 10/2024

**ITEM 3 – DISCIPLINARY INFORMATION**

Jacob Bellinger II has no reportable disciplinary history.

**ITEM 4 – OTHER BUSINESS ACTIVITIES**

Jacob Bellinger II is not actively engaged in any other investment-related business activities other than providing advisory services through Godsey & Gibb Wealth Management.

**ITEM 5 – ADDITIONAL COMPENSATION**

Jacob Bellinger II does not receive any economic benefit from any person, or entity for providing advisory services.

**ITEM 6 – SUPERVISION**

Jacob Bellinger II is supervised by Michael Reilly Gibb, President & CEO of Godsey & Gibb Wealth Management who can be reached at 804-285-7333. Jacob Bellinger II is bound by and adheres to Godsey & Gibb Wealth Management's established written Code of Ethics and Policies & Procedures manual for advice the supervised person provides to clients.



## FORM ADV PART 2B: BROCHURE SUPPLEMENT

**Peter Kenneth Braden, CFP®**

INVESTMENT ADVISOR REPRESENTATIVE

**GODSEY & GIBB WEALTH MANAGEMENT**

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This Form ADV Part 2B (“Brochure Supplement”) provides information about the background and qualifications of Peter Braden (CRD# 1637922) that supplements the Godsey & Gibb Wealth Management (CRD# 105650) Form ADV Part 2A Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of this Brochure Supplement, please contact us at (804) 285-7333 or [compliance@godseyandgibb.com](mailto:compliance@godseyandgibb.com).

Additional information about Peter Braden is available on the SEC's Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching their full name or individual CRD number.

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## **ITEM 2 – EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE**

### **EDUCATION**

University of Richmond, MBA in Business, 1992  
Washington & Lee University, B.A. in Economics, 1986

### **BUSINESS EXPERIENCE**

Godsey & Gibb Wealth Management   Wealth Management Advisor	3/2017 to Present
Hatteras Funds   Client Portfolio Manager	5/2015 to 7/2015
Granville Capital, Inc.   Principal	6/2012 to 3/2015
Fiserv   Senior Sales Executive	7/2010 to 5/2012
Braden Consulting, LLC   President	1/2008 to 7/2010
UBS Financial Services   Alternative Investments Consultant	8/2005 to 12/2007
Bank of America   Director, Regional Investments	4/2003 to 4/2005
J.P. Morgan   Vice President	5/2001 to 12/2002
Scott & Stringfellow   Managing Director, Fee Based Programs	12/1998 to 4/2001
Wheat First Union   Senior Vice President	12/1986 to 5/1998

### **PROFESSIONAL DESIGNATION(S)**

#### **CERTIFIED FINANCIAL PLANNER™ PROFESSIONAL**

The program is administered by the Certified Financial Planner Board of Standards Inc. Those with the CFP® designation have demonstrated competency in all areas of finance related to financial planning. Candidates complete studies on over 100 topics, including stocks, bonds, taxes, insurance, retirement planning and estate planning. In addition to passing the CFP® certification exam, candidates must also complete qualifying work experience, agree to adhere to the CFP Board's code of ethics and professional responsibility and financial planning standards and complete 30 hours of continuing education every two years.

## **ITEM 3 – DISCIPLINARY INFORMATION**

Peter Braden has no reportable disciplinary history.

## **ITEM 4 – OTHER BUSINESS ACTIVITIES**

Peter Braden is not actively engaged in any other investment-related business activities other than providing advisory services through Godsey & Gibb Wealth Management.

## **ITEM 5 – ADDITIONAL COMPENSATION**

Peter Braden does not receive any economic benefit from any person, or entity for providing advisory services.

## **ITEM 6 – SUPERVISION**

Peter Braden is supervised by Michael Reilly Gibb, President & CEO of Godsey & Gibb Wealth Management who can be reached at 804-285-7333. Peter Braden is bound by and adheres to Godsey & Gibb Wealth Management's established written Code of Ethics and Policies & Procedures manual for advice the supervised person provides to clients.



## FORM ADV PART 2B: BROCHURE SUPPLEMENT

# Kyle Michael Fischer, CFP®

## INVESTMENT ADVISOR REPRESENTATIVE

### GODSEY & GIBB WEALTH MANAGEMENT

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This Form ADV Part 2B (“Brochure Supplement”) provides information about the background and qualifications of Kyle Fischer (CRD# 6601181) that supplements the Godsey & Gibb Wealth Management (CRD# 105650) Form ADV Part 2A Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of this Brochure Supplement, please contact us at (804) 285-7333 or [compliance@godseyandgibb.com](mailto:compliance@godseyandgibb.com).

Additional information about Kyle Fischer is available on the SEC's Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching their full name or individual CRD number.

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## ITEM 2 – EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

### EDUCATION

Clemson University, M.S. in Accounting, 2012

Clemson University, B.S. in Accounting, 2011

### BUSINESS EXPERIENCE

Godsey & Gibb Wealth Management   Wealth Management Advisor	08/2019 to Present
LPL Financial   Wealth Advisor	05/2016 to 11/2017
The Peace Center   Administrative Assistant	10/2015 to 01/2016
Elliot Davis Decosimo, LLC   Auditor	10/2012 to 08/2015

### PROFESSIONAL DESIGNATION(S)

#### CERTIFIED FINANCIAL PLANNER™ PROFESSIONAL

The program is administered by the Certified Financial Planner Board of Standards Inc. Those with the CFP® designation have demonstrated competency in all areas of finance related to financial planning. Candidates complete studies on over 100 topics, including stocks, bonds, taxes, insurance, retirement planning and estate planning. In addition to passing the CFP® certification exam, candidates must also complete qualifying work experience, agree to adhere to the CFP Board's code of ethics and professional responsibility and financial planning standards and complete 30 hours of continuing education every two years.

## ITEM 3 – DISCIPLINARY INFORMATION

Kyle Fischer has no reportable disciplinary history.

## ITEM 4 – OTHER BUSINESS ACTIVITIES

Kyle Fischer is not actively engaged in any other investment-related business activities other than providing advisory services through Godsey & Gibb Wealth Management.

## ITEM 5 – ADDITIONAL COMPENSATION

Kyle Fischer does not receive any economic benefit from any person, or entity for providing advisory services.

## ITEM 6 – SUPERVISION

Kyle Fischer is supervised by Michael Reilly Gibb, President & CEO of Godsey & Gibb Wealth Management who can be reached at 804-285-7333. Kyle Fischer is bound by and adheres to Godsey & Gibb Wealth Management's established written Code of Ethics and Policies & Procedures manual for advice the supervised person provides to clients.





## FORM ADV PART 2B: BROCHURE SUPPLEMENT

# Michael Reilly Gibb

## INVESTMENT ADVISOR REPRESENTATIVE

### GODSEY & GIBB WEALTH MANAGEMENT

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This Form ADV Part 2B (“Brochure Supplement”) provides information about the background and qualifications of Michael R. Gibb (CRD# 6017943) that supplements the Godsey & Gibb Wealth Management (CRD# 105650) Form ADV Part 2A Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of this Brochure Supplement, please contact us at (804) 285-7333 or [compliance@godseyandgibb.com](mailto:compliance@godseyandgibb.com).

Additional information about Michael R. Gibb is available on the SEC's Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching their full name or individual CRD number.

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**ITEM 2 – EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE**

**EDUCATION**

Virginia Commonwealth University, B.S. in Economics, 2013

**BUSINESS EXPERIENCE**

Godsey & Gibb Wealth Management   President & CEO	01/2019 to Present
Godsey & Gibb Wealth Management   Vice President	01/2017 to 01/2019
Godsey & Gibb Wealth Management   Portfolio Manager	12/2013 to 12/2016
Godsey and Gibb Wealth Management   Portfolio Management Assistant	09/2010 to 12/2013
Full-Time Education   Student	11/2008 to 09/2010
Godsey & Gibb Wealth Management   Portfolio Management Assistant	02/2006 to 11/2008

**ITEM 3 – DISCIPLINARY INFORMATION**

Michael R. Gibb has no reportable disciplinary history.

**ITEM 4 – OTHER BUSINESS ACTIVITIES**

Michael R. Gibb is not actively engaged in any other investment-related business activities other than providing advisory services through Godsey & Gibb Wealth Management.

**ITEM 5 – ADDITIONAL COMPENSATION**

Michael R. Gibb does not receive any economic benefit from any person, or entity for providing advisory services.

**ITEM 6 – SUPERVISION**

Michael R. Gibb is supervised by Godsey & Gibb Wealth Management’s Board of Directors who can be reached at 804-285-7333. Michael R. Gibb is bound by and adheres to Godsey & Gibb Wealth Management’s established written Code of Ethics and Policies & Procedures manual for advice the supervised person provides to clients.



## FORM ADV PART 2B: BROCHURE SUPPLEMENT

**Alexis Keri Houlihan, CFP® , CSLP®**

INVESTMENT ADVISOR REPRESENTATIVE

**GODSEY & GIBB WEALTH MANAGEMENT**

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This Form ADV Part 2B (“Brochure Supplement”) provides information about the background and qualifications of Alexis Houlihan (CRD# 6813335) that supplements the Godsey & Gibb Wealth Management (CRD# 105650) Form ADV Part 2A Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of this Brochure Supplement, please contact us at (804) 285-7333 or [compliance@godseyandgibb.com](mailto:compliance@godseyandgibb.com).

Additional information about Alexis Houlihan is available on the SEC's Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching their full name or individual CRD number.

**ITEM 2 – EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE****EDUCATION**

Virginia Polytechnic Institute & State University, B.S. in Finance, 2017

**BUSINESS EXPERIENCE**

Godsey & Gibb Wealth Management   Wealth Management Advisor	01/2025 to Present
Godsey & Gibb Wealth Management   Financial Planning Advisor	06/2020 to Present
Godsey & Gibb Wealth Management   Portfolio Manager	01/2019 to 06/2020
Godsey & Gibb Wealth Management   Associate Portfolio Manager	11/2017 to 12/2018
Aspect Partners   Financial Analyst	06/2017 to 10/2017

**PROFESSIONAL DESIGNATION(S)****CERTIFIED FINANCIAL PLANNER™ PROFESSIONAL**

The program is administered by the Certified Financial Planner Board of Standards Inc. Those with the CFP® designation have demonstrated competency in all areas of finance related to financial planning. Candidates complete studies on over 100 topics, including stocks, bonds, taxes, insurance, retirement planning and estate planning. In addition to passing the CFP® certification exam, candidates must also complete qualifying work experience, agree to adhere to the CFP Board's code of ethics and professional responsibility and financial planning standards and complete 30 hours of continuing education every two years.

**CERTIFIED STUDENT LOAN PROFESSIONAL™**

The program is administered by the Certified Student Loan Advisors Board of Standards and is used by licensed financial professionals who seek to provide information to clients about how to efficiently repay student loans within the larger scope of their financial plans. In order to earn and maintain the CSLP® designation, individuals must hold an active financial license in a regulated financial services industry. Individuals must also meet additional certification components of (i) course completion, (ii) pass the CSLP Exam, and (iii) complete all educational lessons that have been released or amended by the Board since the designee completed their course study. Designees are required to complete an annual competency exam to ensure that they continue to demonstrate the knowledge required to provide student loan repayment advice to clients.

**ITEM 3 – DISCIPLINARY INFORMATION**

Alexis Houlihan has no reportable disciplinary history.

**ITEM 4 – OTHER BUSINESS ACTIVITIES**

Alexis Houlihan is not actively engaged in any other investment-related business activities other than providing advisory services through Godsey & Gibb Wealth Management.

**ITEM 5 – ADDITIONAL COMPENSATION**

Alexis Houlihan does not receive any economic benefit from any person, or entity for providing advisory services.

**ITEM 6 – SUPERVISION**

Alexis Houlihan is supervised by Michael Reilly Gibb, President & CEO of Godsey & Gibb Wealth Management who can be reached at 804-285-7333. Alexis Houlihan is bound by and adheres to Godsey & Gibb Wealth Management's established written Code of Ethics and Policies & Procedures manual for advice the supervised person provides to clients.



## FORM ADV PART 2B: BROCHURE SUPPLEMENT

# Christopher Maxwell Leslie, CFP<sup>®</sup>, CIMA<sup>®</sup>

## INVESTMENT ADVISOR REPRESENTATIVE

### GODSEY & GIBB WEALTH MANAGEMENT

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This Form ADV Part 2B (“Brochure Supplement”) provides information about the background and qualifications of Christopher Leslie (CRD# 5971390) that supplements the Godsey & Gibb Wealth Management (CRD# 105650) Form ADV Part 2A Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of this Brochure Supplement, please contact us at (804) 285-7333 or [compliance@godseyandgibb.com](mailto:compliance@godseyandgibb.com).

Additional information about Christopher Leslie is available on the SEC's Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching their full name or individual CRD number.

**ITEM 2 – EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE****EDUCATION**

Southern New Hampshire University, M.S. in Finance, 2018

University of South Florida, B.S. in Finance, 2010

**BUSINESS EXPERIENCE**

Godsey & Gibb Wealth Management   Director of Portfolio Management	07/2024 to Present
Godsey & Gibb Wealth Management   Portfolio Manager	06/2022 to 06/2024
TIAA, FSB   Portfolio Analyst	01/2020 to 06/2022
TIAA, FSB   Sr. Account Services Analyst	09/2017 to 01/2020
TIAA, CREF   Individual Advisory Services Outreach Consultant	09/2012 to 08/2017
TD Ameritrade   Financial Representative Broker	08/2011 to 09/2012

**PROFESSIONAL DESIGNATION(S)****CERTIFIED FINANCIAL PLANNER™ PROFESSIONAL**

The program is administered by the Certified Financial Planner Board of Standards Inc. Those with the CFP® designation have demonstrated competency in all areas of finance related to financial planning. Candidates complete studies on over 100 topics, including stocks, bonds, taxes, insurance, retirement planning and estate planning. In addition to passing the CFP® certification exam, candidates must also complete qualifying work experience, agree to adhere to the CFP Board's code of ethics and professional responsibility and financial planning standards and complete 30 hours of continuing education every two years.

**CERTIFIED INVESTMENT MANAGEMENT ANALYST**

The CIMA designation is issued by the Investments and Wealth Institute (formerly IMCA). To earn each certification, each CIMA candidate must complete a self-study program, attend a one-week classroom education program provided by an Association to Advance Collegiate Schools of Business (“AACSB”) accredited university business school, pass an online examination after self-study and an on-line comprehensive certification examination after meeting all requirements of a registered classroom education program and also complete a minimum of 30 hours of continuing education every two years.

**ITEM 3 – DISCIPLINARY INFORMATION**

Christopher Leslie has no reportable disciplinary history.

**ITEM 4 – OTHER BUSINESS ACTIVITIES**

Christopher Leslie is not actively engaged in any other investment-related business activities other than providing advisory services through Godsey & Gibb Wealth Management.

**ITEM 5 – ADDITIONAL COMPENSATION**

Christopher Leslie does not receive any economic benefit from any person, or entity for providing advisory services.

**ITEM 6 – SUPERVISION**

Christopher Leslie is supervised by Michael Reilly Gibb, President & CEO of Godsey & Gibb Wealth Management who can be reached at 804-285-7333. Christopher Leslie is bound by and adheres to Godsey & Gibb Wealth Management's established written Code of Ethics and Policies & Procedures manual for advice the supervised person provides to clients.



## FORM ADV PART 2B: BROCHURE SUPPLEMENT

# Jeanmarie McGowan, CFA

## INVESTMENT ADVISOR REPRESENTATIVE

### GODSEY & GIBB WEALTH MANAGEMENT

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This Form ADV Part 2B (“Brochure Supplement”) provides information about the background and qualifications of Jeanmarie McGowan (CRD# 2579481) that supplements the Godsey & Gibb Wealth Management (CRD# 105650) Form ADV Part 2A Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of this Brochure Supplement, please contact us at (804) 285-7333 or [compliance@godseyandgibb.com](mailto:compliance@godseyandgibb.com).

Additional information about Jeanmarie McGowan is available on the SEC's Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching their full name or individual CRD number.

**ITEM 2 – EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE****EDUCATION**

Virginia Commonwealth University, MBA in Business Administration, 1997

Elon University, B.S. in Business Administration/Finance, 1987

**BUSINESS EXPERIENCE**

Godsey & Gibb Wealth Management   Chief Investment Officer	06/2020 to Present
Godsey & Gibb Wealth Management   Director of Research	02/2014 to 06/2020
Virginia Commonwealth University   Adjunct Professor	01/2011 to 12/2014
Tattersall Advisory Group   Portfolio Specialist	10/2002 to 12/2010
Trigon Services, Inc.   Portfolio Manager	06/1994 to 08/2002

**PROFESSIONAL DESIGNATION(S)****CHARTERED FINANCIAL ANALYST®**

This designation is offered by the CFA Institute (formerly the Association for Investment Management and Research [AIMR]). To obtain the CFA® charter, candidates must successfully complete three exams and gain at least three (3) years of qualifying work experience, among other requirements. In passing these exams, candidates demonstrate their competence, integrity and extensive knowledge in accounting, ethical and professional standards, economics, portfolio management and security analysis.

**ITEM 3 – DISCIPLINARY INFORMATION**

Jeanmarie McGowan has no reportable disciplinary history.

**ITEM 4 – OTHER BUSINESS ACTIVITIES**

Jeanmarie McGowan is not actively engaged in any other investment-related business activities other than providing advisory services through Godsey & Gibb Wealth Management.

**ITEM 5 – ADDITIONAL COMPENSATION**

Jeanmarie McGowan does not receive any economic benefit from any person, or entity for providing advisory services.

**ITEM 6 – SUPERVISION**

Jeanmarie McGowan is supervised by Michael Reilly Gibb, President & CEO of Godsey & Gibb Wealth Management who can be reached at 804-285-7333. Jeanmarie McGowan is bound by and adheres to Godsey & Gibb Wealth Management's established written Code of Ethics and Policies & Procedures manual for advice the supervised person provides to clients.





## FORM ADV PART 2B: BROCHURE SUPPLEMENT

# Kevin David Riley

## INVESTMENT ADVISOR REPRESENTATIVE

### GODSEY & GIBB WEALTH MANAGEMENT

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This Form ADV Part 2B (“Brochure Supplement”) provides information about the background and qualifications of Kevin Riley (CRD# 2169482) that supplements the Godsey & Gibb Wealth Management (CRD# 105650) Form ADV Part 2A Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of this Brochure Supplement, please contact us at (804) 285-7333 or [compliance@godseyandgibb.com](mailto:compliance@godseyandgibb.com).

Additional information about Kevin Riley is available on the SEC's Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching their full name or individual CRD number.

**ITEM 2 – EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE**

**EDUCATION**

Florida State University, B.S. in Marketing, 1991

**BUSINESS EXPERIENCE**

Godsey & Gibb Wealth Management   Wealth Management Advisor	06/2015 to Present
USAA Wealth Management   Director	12/2013 to 6/2015
Marshwinds Advisory Company   Sr. Vice President	2/2013 to 11/2013
Charles Schwab & Company, Inc.   Vice President and Branch Manager	3/1992 to 8/2012

**ITEM 3 – DISCIPLINARY INFORMATION**

Kevin Riley has no reportable disciplinary history.

**ITEM 4 – OTHER BUSINESS ACTIVITIES**

Kevin Riley is not actively engaged in any other investment-related business activities other than providing advisory services through Godsey & Gibb Wealth Management.

**ITEM 5 – ADDITIONAL COMPENSATION**

Kevin Riley does not receive any economic benefit from any person, or entity for providing advisory services.

**ITEM 6 – SUPERVISION**

Kevin Riley is supervised by Michael Reilly Gibb, President & CEO of Godsey & Gibb Wealth Management who can be reached at 804-285-7333. Kevin Riley is bound by and adheres to Godsey & Gibb Wealth Management’s established written Code of Ethics and Policies & Procedures manual for advice the supervised person provides to clients.



## FORM ADV PART 2B: BROCHURE SUPPLEMENT

# Danny Lee Savage

## INVESTMENT ADVISOR REPRESENTATIVE

### GODSEY & GIBB WEALTH MANAGEMENT

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This Form ADV Part 2B (“Brochure Supplement”) provides information about the background and qualifications of Danny L. Savage (CRD# 2232727) that supplements the Godsey & Gibb Wealth Management (CRD# 105650) Form ADV Part 2A Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of this Brochure Supplement, please contact us at (804) 285-7333 or [compliance@godseyandgibb.com](mailto:compliance@godseyandgibb.com).

Additional information about Danny L. Savage is available on the SEC's Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching their full name or individual CRD number.

**ITEM 2 – EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE**

**EDUCATION**

Indiana University in Bloomington, B.S. in Social Sciences, 1992

**BUSINESS EXPERIENCE**

Godsey & Gibb Wealth Management | Managing Director  
Charles Schwab & Co., Inc | Branch Manager

02/2006 to Present  
01/1992 to 01/2006

**ITEM 3 – DISCIPLINARY INFORMATION**

Danny Savage has no reportable disciplinary history.

**ITEM 4 – OTHER BUSINESS ACTIVITIES**

Danny Savage is not actively engaged in any other investment-related business activities other than providing advisory services through Godsey & Gibb Wealth Management.

**ITEM 5 – ADDITIONAL COMPENSATION**

Danny Savage does not receive any economic benefit from any person, or entity for providing advisory services.

**ITEM 6 – SUPERVISION**

Danny Savage is supervised by Michael Reilly Gibb, President & CEO of Godsey & Gibb Wealth Management who can be reached at 804-285-7333. Danny Savage is bound by and adheres to Godsey & Gibb Wealth Management’s established written Code of Ethics and Policies & Procedures manual for advice the supervised person provides to clients.



## FORM ADV PART 2B: BROCHURE SUPPLEMENT

# Ephraim Ulmer

## INVESTMENT ADVISOR REPRESENTATIVE

### GODSEY & GIBB WEALTH MANAGEMENT

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[www.godseyandgibb.com](http://www.godseyandgibb.com)

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This Form ADV Part 2B (“Brochure Supplement”) provides information about the background and qualifications of Ephraim Ulmer (CRD# 822497) that supplements the Godsey & Gibb Wealth Management (CRD# 105650) Form ADV Part 2A Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of this Brochure Supplement, please contact us at (804) 285-7333 or [compliance@godseyandgibb.com](mailto:compliance@godseyandgibb.com).

Additional information about Ephraim Ulmer is available on the SEC's Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching their full name or individual CRD number.

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**ITEM 2 – EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE**

**EDUCATION**

University of South Carolina, J.D., 1973  
The Citadel, B.A. in Business Administration, 1969

**BUSINESS EXPERIENCE**

Godsey & Gibb Wealth Management   Vice President/Secretary	09/1998 to Present
Godsey & Gibb Wealth Management   Vice President	09/1991 to 09/1998

**ITEM 3 – DISCIPLINARY INFORMATION**

Ephraim Ulmer has no reportable disciplinary history.

**ITEM 4 – OTHER BUSINESS ACTIVITIES**

Ephraim Ulmer is not actively engaged in any other investment-related business activities other than providing advisory services through Godsey & Gibb Wealth Management.

**ITEM 5 – ADDITIONAL COMPENSATION**

Ephraim Ulmer does not receive any economic benefit from any person, or entity for providing advisory services.

**ITEM 6 – SUPERVISION**

Ephraim Ulmer is supervised by Michael Reilly Gibb, President & CEO of Godsey & Gibb Wealth Management who can be reached at 804-285-7333. Ephraim Ulmer is bound by and adheres to Godsey & Gibb Wealth Management’s established written Code of Ethics and Policies & Procedures manual for advice the supervised person provides to clients.



## FORM ADV PART 2B: BROCHURE SUPPLEMENT

**Marc Anthony Verdi, CPA/PFS, CFP®**

INVESTMENT ADVISOR REPRESENTATIVE

**GODSEY & GIBB WEALTH MANAGEMENT**

6806 Paragon Place, Suite 230  
Richmond, VA 23230

(804) 285-7333

[www.godseyandgibb.com](http://www.godseyandgibb.com)

REVISED 03/19/2025

This Form ADV Part 2B (“Brochure Supplement”) provides information about the background and qualifications of Marc A. Verdi (CRD# 5485381) that supplements the Godsey & Gibb Wealth Management (CRD# 105650) Form ADV Part 2A Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of this Brochure Supplement, please contact us at (804) 285-7333 or [compliance@godseyandgibb.com](mailto:compliance@godseyandgibb.com).

Additional information about Marc A. Verdi is available on the SEC's Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching their full name or individual CRD number.

**ITEM 2 – EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE****EDUCATION**

University of Virginia, M.S. in Accounting, 1998

University of Virginia, B.S. in Commerce and Accounting, 1997

**BUSINESS EXPERIENCE**

Godsey & Gibb   Director of Tax & Financial Planning and Chief Financial Officer	08/2013 to Present
Well Coleman & Company   Tax Manager	06/2012 to 07/2013
Marc A Verdi, LLC   Owner	03/2012 to 06/2012
Morgan Stanley Smith Barney   Personal Banker	08/2009 to 03/2012
CB&H Wealth Management Services, LLC   Investment Advisor	01/2009 to 07/2009
Cherry, Bekaert & Holland, LLP   Manager	12/2007 to 07/2009
Keiter Stephens Hurst Gary & Shreaves, PC   Senior Tax Associate	09/2004 to 12/2007
Ernst & Young, LLP   Audit Senior	07/2002 to 08/2004
Insmad, Inc.   Assistant Controller	07/2000 to 07/2002
Ernst & Young, LLP   Staff Auditor	10/1998 to 07/2000

**PROFESSIONAL DESIGNATION(S)****CERTIFIED PUBLIC ACCOUNTANT (CPA)**

To become a CPA, candidates must pass the Uniform Certified Public Accountant Examination, set by the American Institute of Certified Public Accountants and administered by the National Association of State Boards of Accountancy. Candidates must complete a bachelor's degree with a minimum number of qualifying credit hours in accounting and business administration with an additional 1-year study. CPAs are required to take continuing education courses including an ethics course to renew their license with most states requiring 120 hours every 3 years with a minimum of 20 hours per calendar year.

**PERSONAL FINANCIAL SPECIALIST**

The PFS designation is awarded by the American Institute of Certified Public Accountants (AICPA) to those who have taken additional training and already have a CFP® designation. Every PFS credential holder is a licensed CPA and a member in good standing in the AICPA; has met strict education and eligible business experience requirements, including two (2) years of full-time business or teaching experience in personal financial planning and has agreed to the AICPA Code of Professional Conduct.

**CERTIFIED FINANCIAL PLANNER™ PROFESSIONAL**

The program is administered by the Certified Financial Planner Board of Standards Inc. Those with the CFP® designation have demonstrated competency in all areas of finance related to financial planning. Candidates complete studies on over 100 topics, including stocks, bonds, taxes, insurance, retirement planning and estate planning. Candidates must pass the CFP® certification exam, complete qualifying work experience, agree to adhere to the CFP Board's code of ethics and professional responsibility and financial planning standards, and complete 30 hours of continuing education every two years.

**ITEM 3 – DISCIPLINARY INFORMATION**

Marc Verdi has no reportable disciplinary history.

**ITEM 4 – OTHER BUSINESS ACTIVITIES**

Marc Verdi is not actively engaged in any other investment-related business activities other than providing advisory services through Godsey & Gibb Wealth Management.

**ITEM 5 – ADDITIONAL COMPENSATION**

Marc Verdi does not receive any economic benefit from any person, or entity for providing advisory services.

**ITEM 6 – SUPERVISION**



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