This brochure supplement provides information about Jon Richard Otterness that supplements the VPWM Advisors, LLC brochure. You should have received a copy of that brochure. Please contact Jon Richard Otterness if you did not receive VPWM Advisors, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Jon Richard Otterness is also available on the SEC's website at www.adviserinfo.sec.gov.

# **VPWM Advisors, LLC**

Form ADV Part 2B - Individual Disclosure Brochure

for

## Jon Richard Otterness

Personal CRD Number: 4568390 Investment Adviser Representative

> VPWM Advisors, LLC 505 North Highway 169 Suite 260 Plymouth, MN 55441 (763) 587-7120 jon@vpwealthmgmt.com

> > UPDATED: 02/02/2018

## Item 2: Educational Background and Business Experience

Name: Jon Richard Otterness Born: 1970

**Educational Background and Professional Designations:** 

#### **Education:**

Jon Richard Otterness has not received any higher education degrees after high school.

#### **Business Background:**

12/2017 - Present Investment Adviser Representative

VPWM Advisors, LLC

12/2017 - Present Registered Representative

LPL Financial, LLC

11/2007 - 12/2017 Client Relationship Mgr

Ameriprise Financial

## **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**

Jon Richard Otterness is a registered representative at LPL Financial, LLC. From time to time, he will offer clients advice or products from those activities. Clients should be aware that these services pay a commission and involve a conflict of interest, as commissionable products conflict with the fiduciary duties of a registered investment adviser. VPWM Advisors, LLC always acts in the best interest of the client; including the sale of commissionable products to advisory clients. Clients always have the right to decide whether or not to utilize the services of any representative of VPWM Advisors, LLC in such individual's outside capacities.

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

Jon Richard Otterness does not receive any economic benefit from any person, company, or organization, other than VPWM Advisors, LLC in exchange for providing clients advisory services through VPWM Advisors, LLC.

### **Item 6: Supervision**

As a representative of VPWM Advisors, LLC, Jon Richard Otterness is supervised by Joe McRae, the firm's Chief Compliance Officer. Joe McRae is responsible for ensuring that Jon Richard Otterness adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Joe McRae is (763) 587-7120.