



Independent Wealth Network

Charles Garrett Morgan

Archer Financial Partners
7021 Kewanee Ave, Bldg. 8 – 102
Lubbock, TX 79424

806-407-3340 & 806-407-3342
garrett@archerfp.com

Independent Wealth Network, Inc. 2763 86TH Street, Urbandale, IA 50322

(515) 255-3354

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This ADV Part 2B brochure provides information about [Charles Garrett Morgan](#) that supplements the Independent Network, Inc. ADV Part 2A brochure. You should have received a copy of that brochure. Please contact us at (515) 255-3354 or compliance@indwealth.net if you did not receive the Independent Wealth Network, Inc. brochure or if you have any questions about the content of this supplement.

Additional information about [Charles Garrett Morgan](#) is available on the SEC's website at www.adviserinfo.sec.gov.

Educational Background and Business Experience

Year of Birth: 1983

Formal Education beyond high school:

- Texas Tech University, Lubbock, TX - B. S. Personal Financial Planning -2007
- FINRA registration, Series 7 and State registration, Series 66
- Life, Health, Annuity Licensed

Business Background for the past 5 years:

- Archer Financial Partners - IWN Investment Advisor Representative - 09/2018 to present
- McDermott Investment Services LLC - Registered Representative - 01/2019 - present
- Brokers International Financial Services – Registered Representative – 09/2018 to 12/31/2018
- Lowell & Company – Financial Advisor/Investment Advisor Representative - 05/2007-09/2018

Disciplinary Information

List any legal or disciplinary event, which occurred during the previous 10 years.

None.

Other Business Activities

Other capacities in which you participate in investment-related business and the material conflicts of interest this presents:

I am a licensed insurance agent using the name of Archer Financial Partners to provide insurance products including life insurance, disability insurance, long-term care insurance, and fixed annuities. Selling these types of products can generate a sales commission. I sell variable annuities and alternative investments through McDermott Investment based on client suitability. Any commissions earned are paid directly to me.

Any other activities if they involve more than 10% of your time or compensation.

Charles Garrett Morgan has no outside business activities other than passive investments.

Consistent with firm policies I may attend training events, due diligence meetings and other events provided and paid for by the sponsors of mutual funds or other investment products,

which I may recommend to my clients. The receipt of this cash or non-cash compensation may create an incentive to recommend these investment products.

Investment Advisor Representatives are required to act in the best interest of the clients and are required to recommend only investment advisory programs, investment products and securities that are suitable for each client based upon the client's investment objectives, risk tolerance and financial situation and needs.

Supervision

Clients have or will received an Investment Policy Statement as part of their Investment Advisory Agreement which they acknowledge and sign.

The firm utilizes supervision policies applicable to all investment advisory programs, because of the different features and services of our programs, program-specific policies, and procedures.

The compliance officer and supervisor is: Arthur L. Dinkin, President & CCO (515) 255-3354