

Item 1 - Cover Page

Form ADV Part 2B Brochure Supplement

**Grant Richard Milner**

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This brochure supplement provides information about Grant Richard Milner ("Mr. Milner") that supplements the adviser firm G. DeWayne McAnally, LLC brochure. You should have received a copy of that brochure. Please contact Mr. McAnally at 888-488-4625 or via email at [dewayne@gdmcanally.com](mailto:dewayne@gdmcanally.com) if you did not receive the G. DeWayne McAnally, LLC brochure or if you have any questions about the contents of this supplement.

Additional information about Grant Milner is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov). You can view Grant Milner's information on this website by searching for Grant Richard Milner or by his CRD number **5467184**.

## **Item 2 - Educational Background and Business Experience**

**Grant Richard Milner**, Born 1973

### *Educational Background:*

- Boston University Center for Professional Studies - College for Financial Planning (to obtain professional designation(s))

### *Business Experience:*

- G. DeWayne McAnally, LLC, Investment Adviser Representative, March 2011 - Present
- Meyers Associates, L.P., Registered Representative, August 2011 – December 2011
- Anderson & Strudwick, Incorporated, Registered Representative & Investment Adviser Representative, July 2010 – August 2011
- Jesup & Lamont Securities Corp, Registered Representative, June 2009 – July 2010
- Advisory Group, Administrative Assistant, January 2008 – May 2009
- Empire Financial, Registered Representative, May 2008 – December 2008
- Edward Jones, Financial Adviser Representative, December 2007 – April 2008
- Edmond Pick-up Covers, Manager, August 1990 – December 2007

### *Professional Designations:*

Mr. Milner holds the following professional designations:

#### Chartered Financial Analyst (CFA®)

The Chartered Financial Analyst (CFA) charter is a globally respected, graduate-level investment credential established in 1962 and awarded by CFA Institute — the largest global association of investment professionals.

There are currently more than 138,000 CFA charterholders working in 134 countries. To earn the CFA charter, candidates must: 1) pass three sequential, six-hour examinations; 2) have at least four years of qualified professional investment experience; 3) join CFA Institute as members; and 4) commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct.

#### *High Ethical Standards*

The CFA Institute Code of Ethics and Standards of Professional Conduct, enforced through an active professional conduct program, require CFA charterholders to:

- Place their clients' interests ahead of their own
- Maintain independence and objectivity
- Act with integrity
- Maintain and improve their professional competence
- Disclose conflicts of interest and legal matters

#### *Global Recognition*

Passing the three CFA exams is a difficult feat that requires extensive study (successful candidates report spending an average of 300 hours of study per level). Earning the CFA charter demonstrates mastery of many of the advanced skills needed for investment analysis and decision making in today's quickly evolving global financial industry. As a result, employers and clients are increasingly seeking CFA charterholders—often making the charter a prerequisite for employment.

Additionally, regulatory bodies in over 30 countries and territories recognize the CFA charter as a proxy for meeting certain licensing requirements, and more than 125 colleges and universities around the world have incorporated a majority of the CFA Program curriculum into their own finance courses.

#### *Comprehensive and Current Knowledge*

The CFA Program curriculum provides a comprehensive framework of knowledge for investment decision making and is firmly grounded in the knowledge and skills used every day in the investment profession. The three levels of the CFA Program test a proficiency with a wide range of fundamental and advanced investment topics, including ethical and professional standards, fixed-income and equity analysis, alternative and derivative investments, economics, financial reporting standards, portfolio management, and wealth planning.

The CFA Program curriculum is updated every year by experts from around the world to ensure that candidates learn the most relevant and practical new tools, ideas, and investment and wealth management skills to reflect the dynamic and complex nature of the profession. To learn more about the CFA charter, visit [www.cfainstitute.org](http://www.cfainstitute.org).

#### Accredited Asset Management Specialist (AAMS)

The Accredited Asset Management Specialist (AAMS) designation is awarded by the College of Financial Planning to students who:

- successfully complete the self-study AAMS program.
- pass the final examination; and
- comply with the Code of Ethics, which includes agreeing to abide by the Standards of Professional Conduct and Terms and Conditions

The self-study program covers the asset management process; investors, policy and change; risk, return and investment performance; asset allocation and selection; investment strategies; taxation of investment products; investment opportunities for individual retirement; investment considerations for small business owners; executive compensation and benefit plans; insurance products for investment clients; estate planning; and regulatory and ethical issues.

Successful students receive a certificate and are granted a right to use the designation for a two-year period. Continued use of the AAMS designation is subject to ongoing renewal requirements. Every two years individuals must renew their right to continue using the AAMS designation by:

- completing 16 hours of continuing education.
- reaffirming to abide by the Standards of Professional Conduct, Terms and Conditions; and
- paying a fee to continue using the designation.

#### Accredited Wealth Management Advisor (AWMA)

The Accredited Wealth Management Advisor (AWMA) designation is awarded by the College of Financial Planning to students who:

- successfully complete the self-study AWMA program.
- pass the final examination; and
- comply with the Code of Ethics, which includes agreeing to abide by the Standards of Professional Conduct and Terms and Conditions.

The self-study program provides advanced knowledge of asset management, allocation and selection; investment performance and strategies; and taxation issues pertaining to investments for a broad range of investors.

Successful students receive a certificate and are granted the right to use the designation for a two-year period. Continued use of the AWMA designation is subject to ongoing renewal requirements. Every two years individuals must renew their right to continue using the AWMA designation by:

- completing 16 hours of continuing education.
- reaffirming to abide by the Standards of Professional Conduct, Terms and Conditions; and
- paying a biennial fee to continue using the designation.

### **Item 3 - Disciplinary Information**

Mr. Milner has no legal or disciplinary events to report.

### **Item 4 - Other Business Activities**

Mr. Milner also conducts insurance sales as an independent insurance agent. Mr. Milner is independently licensed with all appropriate state Departments of Insurance to sell life and health insurance products through various insurance companies. When acting in this capacity, he will receive customary commissions for selling insurance products.

Mr. Milner may also receive other incentive awards for the recommendation/sale of insurance products. The receipt of compensation and other incentive benefits may affect his judgment when recommending products to his clients. While he endeavors at all times to put the interest of his clients first as a part of his overall fiduciary duty to clients, clients should be aware that the receipt of commissions and additional compensation itself creates a conflict of interest and may affect his decision making process when making recommendations.

Clients are never obligated or required to purchase insurance products from or through Mr. Milner and may choose any independent insurance agent and insurance company to purchase insurance products. Regardless of the insurance agent selected, the insurance agent or agency will receive normal commissions from the sale.

#### MFour LLC

MFour LLC is a limited liability company organized to serve as the entity via which Mr. Milner receives compensation from G. DeWayne McAnally, LLC and the entity conducts no other business.

#### **Item 5 - Additional Compensation**

Other than the fees detailed in G. DeWayne McAnally, LLC's Form ADV Part 2A Disclosure Brochure and as described in Item 4 above, Grant Milner receives no other compensation related to advisory services provided to clients.

#### **Item 6 - Supervision**

Mr. McAnally is the Chief Compliance Officer of the firm G. DeWayne McAnally, LLC. Mr. McAnally is responsible for developing, overseeing, and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives, including Mr. Milner. Mr. McAnally can be contacted at 888-488-4625 or via email at [dewayne@gdmcanally.com](mailto:dewayne@gdmcanally.com).