

Cover Page



RICHARD HOLLAND

**Monterey Wealth Partners LLC
DBA: Monterey Wealth
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Atlanta, Georgia 30338**

Phone: (404) 201-2285

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**FORM ADV PART 2
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Richard Holland that supplements the Monterey Wealth brochure. You should have received a copy of that brochure. Please contact Richard Holland if you did not receive a copy of the Monterey Wealth's brochure or if you have questions about this supplement. Mr. Holland's CRD number is 1624264.

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

Form ADV, Part 2B, Item 2

Educational Background and Business Experience

Richard Holland
Investment Advisor Representative
Year of Birth: 1963

Educational Background:

University of Alabama, Bachelor of Science in Finance, Graduated: 1986

Business Experience:

Monterey Wealth, Investment Advisor Representative, March 2026 – Present

Wealthspire Retirement Advisory, Investment Advisor Representative, October 2025 – March 2026

NFP Retirement, Inc. Investment Advisor Representative, December 2021 – October 2025

AFS Advisors, LLC, Investment Advisor Representative, April 2012 – March 2022

Form ADV, Part 2B, Item 3

Disciplinary Information

Mr. Holland does not have any reportable disciplinary disclosures.

Form ADV, Part 2B, Item 4

Other Business Activities

Richard Holland does not have a financial industry affiliated business to report.

Mr. Holland is a partner in Hogo LLC, a holding company for a vacation house. The company generates no revenue, and Mr. Holland receives no compensation for his involvement. He spends less than 5% of his time each month on this activity.

Form ADV, Part 2B, Item 5

Additional Compensation

Richard Holland does not receive an economic benefit for providing advisory services to anyone who is not a client.

Form ADV, Part 2B, Item 6

Supervision

Monterey Wealth has written supervisory procedures in place that are reasonably designed to detect and prevent violations of the securities laws, rules, and regulations of the U.S. Securities and Exchange Commission. Mr. Holland is supervised by Monterey Wealth's Chief Compliance Officer, David Duncan. Mr. Duncan can be reached at (404) 201-2285.

Form ADV, Part 2B, Item 7

Requirements for State-Registered Advisers

This section is not applicable as Monterey Wealth is SEC registered and not state registered.