



*A Registered Investment Adviser*

Part 2B of Form ADV:  
***Brochure Supplement***  
***Joseph Matthew Ray - CRD # 6236928***

Dated February 23, 2018

For further information about this Brochure Supplement contact:

Bryan L. Weiss  
Home Office  
698 Oldefield Commons Dr. Suite 1  
Greenwood, IN 46142  
Phone (317) 888-9465  
<http://www.marianfinancial.com>  
[bryan@marianfinancial.com](mailto:bryan@marianfinancial.com)

*This brochure supplement provides information about Joseph M. Ray that supplements the Marian Financial Partners, Inc. Form ADV Part 2A brochure. You should have received a copy of that brochure. Please contact Bryan L. Weiss if you did not receive Marian Financial Partners, Inc.'s brochure or if you have any questions about the contents of this brochure supplement.*

*Please note that information about investment adviser representatives is not found at the FINRA Broker Check site, because investment adviser representatives are not registered representatives with a broker-dealer. Information on investment adviser representatives is found instead at the SEC's website located at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).*

*Registration as an Investment Adviser Representative of a Registered Investment Adviser means that the Investment Adviser Representative has either passed a Series 65 examination, or passed both a Series 7 and Series 66, or has qualified by virtue of having one of the following professional designations: CFP®, ChFC®, PFS®, CFA® or CIC®.*

## Table of Contents

I. Education & Experience Background.....	3
II. Disciplinary Information.....	3
III. Other Business Activities.....	3
IV. Additional Compensation.....	3
V. Supervision.....	3
VI. Additional Disclosure Requirements for State-Registered Advisers .....	4

## **I. Education & Experience Background**

➤ *Name:*

➤ Joseph M. Ray (also known as Joe Ray)

➤ *Born:* 1984

➤ *Education Background:*

➤ Ball State University – Bachelor of Science Degree in Actuarial Science – 2007

➤ Ball State University – Bachelor of Science Degree in Mathematical Economics – 2007

- Minor in Foundations of Business

➤ *Business Background:*

➤ Marian Financial Partners, Inc. – Investment Adviser Representative – 2013 – Present

➤ Wellpoint, Inc. – Actuarial Analyst – 2007 – 2009

➤ Timmerberg and Associates – Actuarial Analyst – 2009 – 2010

➤ Wellpoint, Inc. – Capital Management Analyst – 2010 to Present

## **II. Disciplinary Information**

Joseph M. Ray has a clean securities and investment adviser background history and he has no disciplinary information on his record pertaining to any licenses that he has held in the past or currently holds today in Indiana or any other state.

Additional information about Joseph M. Ray is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## **III. Other Business Activities**

Joseph M. Ray is analyst Capital Management Analyst for Wellpoint, Inc. which is the firm where he works primarily. Mr. Ray spends a significant amount of time (more than 98%) working for Wellpoint, Inc. and an insignificant amount of time (less than 2%) working for Marian Financial Partners, Inc.

## **IV. Additional Compensation**

Mr. Ray receives his primary source of income from his position as analyst Capital Management Analyst with Wellpoint, Inc. with his secondary source of income coming from Marian Financial Partners, Inc.

## **V. Supervision**

Mr. Ray is supervised by the owner of Marian Financial Partners, Inc., Bryan L. Weiss.

## **VI. Additional Disclosure Requirements for State-Registered Advisers**

Mr. Ray has a clean securities and investment adviser background history and therefore he has no disciplinary information on his record pertaining to any licenses and or designations that he has held in the past or currently holds today in Indiana or any other state. Mr. Ray has never declared bankruptcy.