

**Item 1: Cover Page
Part 2B of Form ADV: Brochure Supplement
January 2025**

Tim C. Chen



Anchor Wealth Management
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This brochure supplement provides information about Mr. Chen that supplements our brochure. You should have received a copy of that brochure. Please contact Mr. Chen if you did not receive Anchor Wealth Management, LLC's brochure or if you have any questions about the contents of this supplement. Additional information about Mr. Chen is available on the SEC's website at www.adviserinfo.sec.gov by searching CRD #4719484.

Item 2: Educational Background & Business Experience

Tim Chiung Chen
Year of Birth: 1979

Educational Background:

- 2001: Boston University; Bachelor of Science in Business Administration with Dual Concentrations in Finance & Operations Management
- 2009: University of California, Irvine; Master of Business Administration in Entrepreneurship

Business Background:

- 03/2017 – Present Anchor Wealth Management, LLC; Managing Member, Chief Compliance Officer & Investment Advisor
- 05/2017 – 03/2022 MS Howells & Co; Registered Representative
- 05/2005 – 04/2017 LPL Financial, LLC (dba Anchor Wealth Management); Financial Advisor & Registered Representative
- 10/2003 – 05/2005 American Express Financial Advisors, Inc; Financial Advisor
- 10/2003 – 05/2005 IDS Life Insurance Company; Agent

Exams, Licenses & Other Professional Designations:

- 2004: Series 7 & 66 Exams
- 2013: Series 24 Exam
- 2010: Insurance Licensed

Item 3: Disciplinary Information¹

There are no legal or disciplinary events material to the evaluation of Mr. Chen.

Item 4: Other Business Activities

Mr. Chen is a licensed insurance agent. As a result of these transactions, he receives normal and customary commissions. A conflict of interest exists as these commissionable sales create an incentive to recommend products based on the compensation earned. To mitigate this potential conflict, recommendations for these products will only be made when suitable for the client and in the client's best interest.

¹ Note: Our firm may, under certain circumstances, rebut the presumption that a disciplinary event is material. If an event is immaterial, we are not required to disclose it. When we review a legal or disciplinary event involving the advisor to determine whether it is appropriate to rebut the presumption of materiality, we consider all of the following factors: (1) the proximity of advisor to the advisory function; (2) the nature of the infraction that led to the disciplinary event; (3) the severity of the disciplinary sanction; and (4) the time elapsed since the date of the disciplinary event. If we conclude that the materiality presumption has been overcome, we prepare and maintain a file memorandum of our determination in our records. We follow SEC rule 204-2(a)(14)(iii) and similar state rules.

Item 5: Additional Compensation

Mr. Chen does not receive any other economic benefit for providing advisory services in addition to advisory fees.

Item 6: Supervision

Mr. Chen is a Managing Member and Chief Compliance Officer and as such has no internal supervision placed over him. He is, however, bound by our firm's Code of Ethics. Please contact Mr. Chen at 949-988-7382 with any questions you have about Mr. Chen's brochure supplement.

Item 7: Requirements for State-Registered Advisers

Mr. Chen has not been involved in any arbitration claim alleging damages in excess of \$2,500. Furthermore, he has neither been involved in nor found liable in any civil, self-regulatory organization, or administrative proceeding nor has been the subject of any bankruptcy petitions.