

**Phil Bell**

**Ted Buchan & Company**

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**FORM ADV PART 2B  
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Phil Bell that supplements the Ted Buchan & Company brochure. You should have received a copy of that brochure. Please contact Director of Operations - Kimberley Miller at [kim@tedbuchan.com](mailto:kim@tedbuchan.com) if you did not receive Ted Buchan & Company's brochure or if you have any questions about the contents of this supplement.

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## ***Educational Background and Business Experience***

Form ADV Part 2B, Item 2

### **Phil Bell**

*Year of Birth:* 1958

#### ***Business Background for the Previous Five Years:***

- Ted Buchan & Company, Investment Advisor Representative, 08/2007 – present
- College Financial Aid Advisors, President/ Owner, 08/1999 – 08/2007
- AIG Financial Advisors Inc, Registered Representative, 10/2005- 08/2007

#### ***Certifications:***

NASD, Series 6, Investment Company/ Variable Contracts Representative, January 1999  
NASAA, Series 63, Uniform Securities Agent State Law Examination, January 1999  
NASAA, Series 65, Investment Adviser Representative, July 2007

## ***Disciplinary Information***

Form ADV Part 2B, Item 3

Phil Bell has not been found in guilty in any criminal or civil action. He has not been subject to any proceedings before the SEC, any other federal agency, any state regulatory agency or any foreign regulatory authority. He has not been in a SRO proceeding.

## ***Other Business Activities***

Form ADV Part 2B, Item 4

Phil Bell is a director on the Valley Center Fire Protection District Board of Directors, currently serving a 2 year appointment (February 2011 – February 2013). This consists of monthly time commitment of 12 -18 hours.

## ***Additional Compensation***

Form ADV Part 2B, Item 5

Phil Bell does not receive any other economic benefits by his clients.

## ***Supervision***

Form ADV Part 2B, Item 6

Phil Bell is supervised by the owner Edward (Ted) Buchan. Advice given to clients is noted in the firm's practice management system.

### ***Requirements for State-Registered Advisers***

Form ADV Part 2B, Item 7

A. In addition to the events listed in Item 3 of Part 2B, if the supervised person has been involved in one of the events listed below, disclose all material facts regarding the event.

1. An award or otherwise being found liable in an arbitration claim alleging damages in excess of \$2,500, involving any of the following:

- (a) an investment or an investment-related business or activity;
- (b) fraud, false statement(s), or omissions;
- (c) theft, embezzlement, or other wrongful taking of property;
- (d) bribery, forgery, counterfeiting, or extortion; or
- (e) dishonest, unfair, or unethical practices.

2. An award or otherwise being found liable in a civil, self-regulatory organization, or administrative proceeding involving any of the following:

- (a) an investment or an investment-related business or activity;
- (b) fraud, false statement(s), or omissions;
- (c) theft, embezzlement, or other wrongful taking of property;
- (d) bribery, forgery, counterfeiting, or extortion; or
- (e) dishonest, unfair, or unethical practices.

**Phil Bell has not been involved in any of the above listed events.**

B. If the supervised person has been the subject of a bankruptcy petition, disclose that fact, the date the petition was first brought, and the current status.

**Phil Bell has not been involved with a bankruptcy petition.**