



Part 2B of Form ADV: Brochure Supplement

## Douglas Anderson

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## Brochure Supplement

Dated 01/01/2025

This BROCHURE SUPPLEMENT provides information about Douglas Anderson that supplements the Life Strategies, Inc FIRM BROCHURE document. You should have received a copy of that FIRM BROCHURE. Please contact Douglas Anderson if you did not receive Life Strategies, Inc.'s FIRM BROCHURE or if you have any questions about the contents of this BROCHURE SUPPLEMENT. Additional information about Douglas Anderson is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) (the CRD number for Douglas Anderson is 4625870)

NOTE: While Life Strategies, Inc. may refer to itself as a "registered investment advisor" or "RIA", clients should be aware that registration itself does not imply any level or skill or training.

## **EDUCATIONAL AND BUSINESS EXPERIENCE**

**Douglas Anderson**

Born 1979

### **Professional Designation:**

Certified Financial Planner ®

The CFP® certification process, administered by CFP Board, identifies to the public that those individuals who have been authorized to use the CFP® certification marks in the U.S. have met rigorous professional standards and have agreed to adhere to the principles of integrity, objectivity, competence, fairness, confidentiality, professionalism and diligence when dealing with clients.

### **Post-Secondary Education:**

California Polytechnic State University, San Luis Obispo: B.S. Economics, 2002

### **Recent Business Background:**

Life Strategies, Inc., managing principal, Oct. 2009 – present

Advanced Planning Services, Director of Operations, Oct. 2006 – Oct. 2009

Bisys, Inc., Sales Manager, May 2003 – Oct. 2006

## **DISCIPLINARY INFORMATION**

Douglas Anderson has had no legal or disciplinary events in his past. Clients and prospective clients can view the CRD records (registration records) Douglas through the SEC's Investment Adviser Public Disclosure (IAPD) website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) or FINRA's BrokerCheck database online at [www.finra.org/brokercheck](http://www.finra.org/brokercheck). The CRD number for Douglas Anderson is 4625870.

## **OTHER BUSINESS ACTIVITIES**

In addition to being an investment adviser representatives (hereafter "IA Rep") of Life Strategies, Inc (hereafter "Life Strategies"), Douglas Anderson is licensed as an independent insurance agent in California. Douglas Anderson may make recommendations on insurance products and may also, as an independent insurance agent, sell those recommended insurance products to advisory clients. When such recommendations or sales are made, a conflict of interest exists as Douglas may earn insurance commissions for the sale of those products, which may create an incentive to recommend such products. Life Strategies requires that Douglas disclose this conflict of interest when such recommendations are made. Also, Life Strategies requires Douglas to disclose that advisory clients may purchase recommended insurance products from other insurance agents not affiliated with Life Strategies. The approximate amount of time spent in insurance-related activities is less than 10% of overall activities. Where possible, insurance-related activities are avoided during trading hours. Where unavoidable, Douglas allows interruption of insurance-related activities for any needed trading activity.

## **ADDITIONAL COMPENSATION**

Aside from the sales commissions paid by insurance companies to Douglas Anderson (see the "OTHER BUSINESS ACTIVITIES" section above), Douglas receives no additional compensation from non-clients for providing advisory services. All advisory compensation is paid by clients directly.

## **SUPERVISION**

As principal of Life Strategies, Douglas Anderson is primarily responsible for supervision of Life Strategies and its IA Reps. All financial plan recommendations are reviewed by Douglas before the financial plan is complete. For portfolio management recommendations, Douglas reviews all recommended transactions at the end of each day. Douglas also reviews accounts as a whole each quarter in conjunction with the calculation of advisory fees. Advisory clients may contact Douglas Anderson directly. Douglas Anderson, Principal ..... (916) 541-3846

## **REQUIREMENTS FOR STATE-REGISTERED ADVISERS**

Life Strategies is required to disclose additional information for Douglas Anderson if he has ever been awarded or ever been found liable in either: (a) an arbitration; or (b) a civil, self-regulatory organization, or administrative proceeding. As neither of these apply to Douglas, Life Strategies has no information to disclose in this regard.

Life Strategies is required to disclose information if Douglas Anderson was the subject of a bankruptcy petition in the last 10 years. As this does not apply, Life Strategies has no information to disclose in this regard.