

FORM ADV PART 2B BROCHURE SUPPLEMENT

Item 1-Cover Page

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This brochure supplement provides information about William Lafferty that supplements the TA Capital Management, LLC ("TA Capital") disclosure brochure. You should have received a copy of that brochure. Please contact Aimee Baehr at 646-290-5660 or at abaehr@tacapitalmanagement.com if you did not receive TA Capital's brochure or if you have any questions about the contents of this supplement.

Item 1-Educational Background and Business Experience

William Lafferty (b.04.30.92) graduated from Rowan University in Glassboro, NJ with a Bachelor of Sciences degree with a major in Finance in 2018,. He started working full-time with Total Alignment Wealth Advisors (TA Capital Management's parent company) in August of 2018. In 2019 he passed the Series 65 exam and now also works at TA Capital Management.

CERTIFIED FINANCIAL PLANNER™, CFP® and CFP (with a flame design) (collectively, the "CFP® marks") - are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Among other requirements, CFP Board requires those who are authorized to use its marks to have demonstrated a mastery of nearly 100 topics related to integrated financial planning. Those topics include, but are not limited to, the topics of: insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning. Knowledge in these areas is generally demonstrated by the individual receiving a passing score on a 6-hour examination on these topics. In addition to passing that exam, individuals who are authorized to use the CFP® marks must also: (i) hold a Bachelor's degree, (ii) complete a required course of study (or qualify for an exemption from such course of study by virtue of a holding a related designation or license), (iii) have relevant work experience of three years (and on exception, two years), and (iv) pass a background check and comply with CFP Board's *Standards of*

Professional Conduct, which is a set of documents outlining the ethical and practice standards for CFP® professionals and (v) complete 30 hours of continuing education every year.

Item 3- Disciplinary Information

William Lafferty has no legal or disciplinary events to report.

Item 4- Other Business Activities

William Lafferty also works with our parent company, Total Alignment Wealth Advisors as an associate. He spends about 75% of his time working for Total Alignment Wealth Advisors and 25% of his time working for TA Capital Management.

Item 5- Additional Compensation

Other than his normal compensation from TA Capital Management and Total Alignment Wealth Advisors, William receives no additional compensation for providing investment advice.

Item 6- Supervision

Aimee Baehr is the Chief Compliance Officer of TA Capital Management. She is responsible for overseeing and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives. Aimee Baehr can be contacted at 646-290-5660.