

**Part 2B of Form ADV: *Brochure Supplement***

Junmin (NMN) Chang  
2603 Camino Ramon, Suite 416  
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888-839-9399

Cannon Beach Financial Advisors  
2603 Camino Ramon  
Suite 416  
San Ramon, CA 94583

03/26/2024

This brochure supplement provides information about Junmin (NMN) Chang that supplements the Cannon Beach Financial Advisors brochure. You should have received a copy of that brochure. Please contact Junmin Chang 888-839-9399 if you did not receive Cannon Beach Financial Advisors' brochure or if you have any questions about the contents of this supplement.

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

***Item 2 Educational Background and Business Experience:***

Full Legal Name: Junmin (NMN) Chang      Born: 1962

**Education:**

- Santa Clara University; MBA, Finance/International Business; 1993
- University of Pennsylvania; BSEE, Electrical Engineering and Economics; 1986

**Business Experience:**

- Cannon Beach Consultants Inc DBA Cannon Beach Financial Advisors; Principal and CEO; from 08/2011 to Present
- Chang Moore Jones Inc DBA Cannon Beach Consultants; Principal and CEO; from 08/2006 to 08/2011
- American Express Financial Advisors/Ameriprise Financial; Financial Advisor, Branch Manager; from 08/2001 to 07/2006
- American Express Financial Advisors; Financial Advisor; from 04/2000 to 08/2001
- Komag, Inc; Senior Manager, R&D Engineer; from 10/1986 to 10/1999

***Item 3 Disciplinary Information:***

Junmin (NMN) Chang has no reportable disciplinary history.

***Item 4 Other Business Activities:*****A. Investment-Related Activities**

1. Junmin (NMN) Chang is also engaged in the following investment-related activities:

**Other investment-related business:**

- Managing partner and founder of two investment clubs (Redwood Investments and Tiger Investment Group). Both clubs are organized as Investment club partnerships and its members receive an annual K-1.
- Both investment clubs are organized and run according to guidelines provided by National Association of Investment Clubs (NAIC). Current Cannon Beach Financial Advisors (CBFA) clients were members of these investment clubs prior to becoming CBFA clients. Both investment clubs have not and currently are not accepting any new members. Any investment activities related to both investment clubs are independent from investment activities and recommendations provided by CBFA.

2. Junmin (NMN) Chang does not receive commissions, bonuses or other compensation on the sale of securities or other investment products.

**B. Non Investment-Related Activities**

Junmin (NMN) Chang is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of his or her time.

***Item 5 Additional Compensation:***

Junmin (NMN) Chang does not receive any economic benefit from a non-advisory client for the provision of advisory services.

***Item 6 Supervision:***

Supervisor: Gregory S. Rogers

Title: President/COO

Phone Number: 888-839-9399

**Part 2B of Form ADV: *Brochure Supplement***

Gregory Stewart Rogers  
1330 Beacon Street, Suite 347  
Brookline, MA 02446  
888-839-9399

Cannon Beach Financial Advisors  
2603 Camino Ramon  
Suite 416  
San Ramon, CA 94583

03/26/2024

This brochure supplement provides information about Gregory Stewart Rogers that supplements the Cannon Beach Financial Advisors brochure. You should have received a copy of that brochure. Please contact Junmin Chang 888-839-9399 if you did not receive Cannon Beach Financial Advisors' brochure or if you have any questions about the contents of this supplement.

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

## ***Item 2 Educational Background and Business Experience:***

Full Legal Name: Gregory Stewart Rogers      Born: 1965

### **Education:**

- Boston University; Certificate, Financial Planning; 2010
- University of Pennsylvania, The Wharton School of Business; BS, Economics; 1987

### **Business Experience:**

- Cannon Beach Consultants, Inc DBA Cannon Beach Financial Advisors; Principal and President/COO; from 08/2011 to Present
- Chang Moore Jones Inc DBA Cannon Beach Consultants; Principal and COO; from 10/2009 to 08/2011
- Fidelity Investment Institutional Services Company, Inc; Vice President; from 02/2007 to 12/2008
- Fidelity Brokerage Services; Vice President; from 05/1998 to 02/2007
- FMR Corporation; Director, New Business Development; from 04/1996 to 05/1998
- Corporate Decisions, Inc; Management Consultant; from 05/1989 to 03/1996

### **Designations:**

Gregory Stewart Rogers has earned the following designation(s) and is in good standing with the granting authority:

- Certified Financial Planner<sup>™</sup>; Certified Financial Planner Board of Standards, Inc.; 2012
- The program is administered by the Certified Financial Planner Board of Standards Inc. Those with the CFP® designation have demonstrated competency in all areas of finance related to financial planning. Candidates complete studies on over 100 topics, including stocks, bonds, taxes, insurance, retirement planning and estate planning. In addition to passing the CFP® certification exam, candidates must also complete qualifying work experience, agree to adhere to the CFP Board's code of ethics and professional responsibility and financial planning standards and complete 30 hours of continuing education every two years.

## ***Item 3 Disciplinary Information:***

Gregory Stewart Rogers has no reportable disciplinary history.

***Item 4 Other Business Activities:***

A. Investment-Related Activities

1. Gregory Stewart Rogers is not engaged in any other investment-related activities.
2. Gregory Stewart Rogers does not receive commissions, bonuses or other compensation on the sale of securities or other investment products.

B. Non Investment-Related Activities

Gregory Stewart Rogers is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of his or her time.

***Item 5 Additional Compensation:***

Gregory Stewart Rogers does not receive any economic benefit from a non-advisory client for the provision of advisory services.

***Item 6 Supervision:***

Supervisor: Junmin Chang

Title: CEO/CCO

Phone Number: 888-839-9399