

Part 2B of Form ADV: *Brochure Supplement*

Jeremiah J Lee
6772 Magnolia Ave
Riverside, CA 92506
951-684-7011

TriCord Advisors, Inc.
6772 Magnolia Ave
Riverside, CA 92506

03/31/2024

This brochure supplement provides information about Jeremiah J Lee that supplements the TriCord Advisors, Inc. brochure. You should have received a copy of that brochure. Please contact Jeremiah Lee 951-684-7011 if you did not receive TriCord Advisors, Inc.'s brochure or if you have any questions about the contents of this supplement.

Additional information about Jeremiah J Lee is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Full Legal Name: Jeremiah J Lee **Born:** 1983

Education

- Pepperdine University; JD, Law; 2012
- University of California, Berkley; BS, Business Administration; 2007
- Calvary Chapel Bible College; AD, Theology; 2004

Business Experience

- TriCord Advisors, Inc.; Chief Executive Officer/ Shareholder/ Financial Advisor; from 12/31/2023 to Present
- TriCord Legal Services, Inc.; Attorney; from 1/1/2020 to Present
- TriCord Advisors, Inc.; Financial Advisor; from 1/1/2020 to 12/31/2023
- Best, Best, & Krieger, LLP; Associate Attorney; from 2013 to 2019
- Western Asset Management Co.; Intern to London, UK General Counsel; from 2010 to 2010
- Huron Consulting Group; Associate; from 2007 to 2009

Designations

Jeremiah J Lee has earned the following designation(s) and is in good standing with the granting authority:

- Juris Doctor; California Bar Association; 2012
- Certified Financial Planner™; Certified Financial Planner Board of Standards, Inc.; 2022

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

Jeremiah J Lee has no reportable disciplinary history.

Item 4 Other Business Activities

A. Investment-Related Activities

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

B. Non Investment-Related Activities

Jeremiah J Lee 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

Jeremiah J Lee does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Item 6 Supervision

Supervisor: Christopher M Marsh

Title: Chief Compliance Officer

Phone Number: 951-684-7011

Christopher M. Marsh, Chief Compliance Officer of TriCord Advisors, Inc. is responsible for supervising Mr. Lee's advisory activities. Mr. Marsh monitors email communications and periodically reviews accounts.