

Part 2B of Form ADV: *Brochure Supplement*

Laura E. Lee
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Riverside, CA 92506
9516847011

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

03/31/2024

This brochure supplement provides information about Laura E 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 Laura E Lee is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Full Legal Name: Laura E Lee **Born:** 1983

Education

- Cal Lutheran University; Masters, Business Administration; 2023
- UC Berkeley; BS, English Literature; 2006

Business Experience

- TriCord Advisors, Inc.; Financial Advisor; from 09/01/2023 to Present
- Homemaker; Homemaker; from 05/01/2023 to 08/31/2023
- Cal Lutheran University; Full Time Student; from 08/02/2021 to 05/31/2023
- Homemaker; Homemaker; from 01/01/2021 to 08/01/2021
- Specialty Coffee Association; Director of Business Development; from 10/01/2007 to 12/31/2020

Designations

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

- Candidate for certification as a Certified Financial Planner™; Certified Financial Planner Board of Standards, Inc.; 2023

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

Laura E Lee has no reportable disciplinary history.

Item 4 Other Business Activities

A. Investment-Related Activities

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

B. Non Investment-Related Activities

Laura E 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

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

Item 6 Supervision

Supervisor: Christopher Marsh

Title: Chief Compliance Officer

Phone Number: 951-684-7011

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