

This brochure supplement provides information about Roger G. Chen that supplements the MYeCFO, LLC brochure. You should have received a copy of that brochure. Please contact Roger G. Chen, Financial Adviser if you did not receive MYeCFO, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Roger G. Chen is also available on the SEC's website at www.adviserinfo.sec.gov.

MYeCFO, LLC
d/b/a MYeCFO

Form ADV Part 2B – Individual Disclosure Brochure

for

Roger G. Chen

Personal CRD Number: 7888385
Investment Adviser Representative

MYeCFO, LLC
6020 La Jolla Hermosa Avenue
La Jolla, California 92037
(650) 231-4609
martin@myecfo.com

UPDATED:03/11/2024

Item 2: Educational Background and Business Experience

Name: Roger G. Chen **Born:** 1971

Education Background and Professional Designations:

Education:

BS Mathematical and Computational Science, Stanford University - 1993
MBA Finance, UCLA Anderson School of Management - 2000

Designations/Certifications/Licenses:

CFA - Chartered Financial Analyst

The Chartered Financial Analyst (CFA) charter is a globally respected, graduate-level investment credential established in 1962 and awarded by CFA Institute - the largest global association of investment professionals.

There are currently more than 90,000 CFA charterholders working in 134 countries. To earn the CFA charter, candidates must: 1) pass three sequential, six-hour examinations; 2) have at least four years of qualified professional investment experience; 3) join CFA Institute as members; and 4) commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct.

High Ethical Standards

The CFA Institute Code of Ethics and Standards of Professional Conduct, enforced through an active professional conduct program, require CFA charterholders to:

- Place their clients' interests ahead of their own
- Maintain independence and objectivity
- Act with integrity
- Maintain and improve their professional competence
- Disclose conflicts of interest and legal matters

Global Recognition

Passing the three CFA exams is a difficult feat that requires extensive study (successful candidates report spending an average of 300 hours of study per level). Earning the CFA charter demonstrates mastery of many of the advanced skills needed for investment analysis and decision making in today's quickly evolving global financial industry. As a result, employers and clients are increasingly seeking CFA charterholders-often making the charter a prerequisite for employment.

Additionally, regulatory bodies in 22 countries and territories recognize the CFA charter as a proxy for meeting certain licensing requirements, and more than 125 colleges and universities around the world have incorporated a majority of the CFA Program curriculum into their own finance courses.

The CFA Program curriculum provides a comprehensive framework of knowledge for investment decision making and is firmly grounded in the knowledge and skills used every day in the investment profession. The three levels of the CFA Program test a proficiency with a wide range of fundamental and advanced investment topics, including ethical and professional standards, fixed-income and equity analysis, alternative and derivative investments, economics, financial reporting standards, portfolio management, and wealth planning.

The CFA Program curriculum is updated every year by experts from around the world to ensure that candidates learn the most relevant and practical new tools, ideas, and investment and wealth management skills to reflect the dynamic and complex nature of the profession.

To learn more about the CFA charter, visit www.cfainstitute.org.

PRM – Professional Risk Manager

The Professional Risk Manager (PRM) Designation is a globally recognized, graduate-level risk management credential. Today's Risk Professionals are expected to know and understand industry best practices and be committed to using them. There is no better way for risk managers to show their commitment than by proving that they have the knowledge, skills, and qualifications to back their experience.

The PRM Program is a series of certification exams, designed to measure the knowledge of professional risk managers and ensure they meet a specific performance standard in their profession. Endorsed by leading university programs and industry firms, it is the global standard for risk management professionals.

Built by a broad coalition of industry leaders to reflect the mission objectives of the association and to establish the leading form of education, validation and certification in the Risk Management profession, the PRM counts candidates from over 100 countries, more than any other risk certification program, anywhere.

Individuals with the PRM designation have demonstrated their knowledge and understanding of:

- the classic finance theory underpinning risk management
- the foundations of risk measurement
- the foundation of option theory
- financial instruments and their associated risks and uses
- the daily form and function of trading markets
- risk management best practices
- lessons learned from failed systems and practices and major risk events
- best practices of governance, conduct and ethics

To learn more about the PRM designation, visit www.prmia.org.

Business Background:

03/2024 - Present	Investment Advisor Representative MYeCFO, LLC
06/2023 - Present	Executive Risk Consultant Milliman
08/2010 - 03/2023	Vice President New York Life Insurance Company
11/2008 - 08/2010	Senior Manager Ernst & Young LLP
11/2006 - 11/2008	Project Manager AIG
06/2003 - 11/2006	Senior Manager Ernst & Young LLP
06/2002 - 06/2003	Product Manager Bullrun Financial
08/2000 - 06/2002	Associate Bank of America
09/1998 - 06/2000	MBA Student UCLA Anderson School of Management
11/1997 - 07/1998	Assistant Vice President Bay View Capital Corporation
02/1994 - 10/1997	Associate Project Manager FICO

Item 3: Disciplinary Information

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

Item 4: Other Business Activities

Roger G. Chen is not engaged in any investment-related business or occupation (other than this advisory firm).

Item 5: Additional Compensation

Other than salary, annual bonuses, or regular bonuses, Roger G. Chen does not receive any economic benefit from any person, company, or organization, in exchange for providing clients advisory services through MYeCFO, LLC.

Item 6: Supervision

Roger G. Chen is supervised by the owners and managing members of MYeCFO, LLC, Martin Raul Curiel and Michael Robert Munson. Together they supervise all duties and activities of the firm. Roger G. Chen's contact information is on the cover page of this disclosure document. Roger G. Chen adheres to all required regulations regarding the activities of an Investment Adviser Representative and follows all policies and procedures outlined in the firm's policies and procedures manual, including the Code of Ethics, and appropriate securities regulatory requirements.

Item 7: Requirements For State Registered Advisers

This disclosure is required by California securities authorities and is provided for your use in evaluating this investment advisor representative's suitability.

A. Roger G. Chen has **NOT** been involved in any of the events listed below.

1. An award or otherwise being found liable in an arbitration claim alleging damages in excess of \$2,500, involving any of the following:
 - a) an investment or an investment-related business or activity;
 - b) fraud, false statement(s), or omissions;
 - c) theft, embezzlement, or other wrongful taking of property;
 - d) bribery, forgery, counterfeiting, or extortion; or
 - e) dishonest, unfair, or unethical practices.
2. An award or otherwise being found liable in a civil, self-regulatory organization, or administrative proceeding involving any of the following:
 - a) an investment or an investment-related business or activity;
 - b) fraud, false statement(s), or omissions;
 - c) theft, embezzlement, or other wrongful taking of property;

- d) bribery, forgery, counterfeiting, or extortion; or
- e) dishonest, unfair, or unethical practices.

B. Roger G. Chen has **NOT** been the subject of a bankruptcy petition in the past ten years.