

**Item 1: Cover Page
Part 2B of Form ADV: Brochure Supplement
February 2024**



**STRONGBOX
WEALTH**

Charles S. Cooper III, CFP®

**StrongBox Wealth, LLC
3470 NE Ralph Powell Road, Ste A
Lee's Summit, MO 64064
Ph: 816-607-5410**

www.StrongBoxWealth.com

**Firm Contact:
Charles Cooper III
Chief Compliance Officer**

This brochure supplement provides information about Mr. Cooper that supplements our brochure. You should have received a copy of that brochure. Please contact Mr. Cooper if you did not receive StrongBox Wealth, LLC's brochure or if you have any questions about the contents of this supplement. Additional information about Mr. Cooper is available on the SEC's website at www.adviserinfo.sec.gov by searching CRD #2290910.

Item 2: Educational Background & Business Experience

Charles Sherwood Cooper III, CFP®

Year of Birth: 1970

Educational Background:

- 1992: University of Missouri-Columbia; Bachelor of Science in Business – Public Administration

Business Background:

- 08/2019 – Present StrongBox Wealth, LLC; Managing Partner
- 08/2019 – 07/2022 Purshe Kaplan Sterling; Registered Representative
- 01/2008 – 08/2019 Wells Fargo Advisors, LLC; BOM, Managing Director
- 08/1997 – 01/2008 A.G. Edwards & Sons, Inc.; Financial Advisor
- 08/1993 – 08/1997 Edward Jones Co., LP; Financial Advisor.

Exams, Licenses & Other Professional Designations:

- 2010: Series 66 Exam
- 2007: CERTIFIED FINANCIAL PLANNER™, CFP®
- 1999: Series 8 Exam
- 1993: Series 7 Exam

CERTIFIED FINANCIAL PLANNER™, CFP®

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its high standard of professional education, stringent code of conduct and standards of practice and ethical requirements that govern professional engagements with clients. To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements: Complete an advanced college-level course of study addressing the financial planning subject areas that CFP® Board's studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a Bachelor's Degree from a regionally accredited United States college or university (or its equivalent from a foreign university, pass the comprehensive CFP® Certification Examination, Complete at least three years of full-time financial planning-related experience and agree to be bound by CFP® Board's *Standards of Professional Conduct*.

Individuals who become certified must complete 30 hours of continuing education hours every two years, including two hours on the *Code of Ethics* and other parts of the *Standards of Professional Conduct*, to maintain competence and keep up with developments in the financial industry and renew an agreement to be bound by the *Standards of Professional Conduct*. The Standards prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

Item 3: Disciplinary Information¹

There are no legal or disciplinary events material to the evaluation of Mr. Cooper.

Item 4: Other Business Activities

Mr. Cooper is a licensed insurance agent/broker. He may offer products and receive normal and customary commissions as a result of these transactions. A conflict of interest may arise as these commissionable securities sales may create an incentive to recommend products based on the compensation earned. To mitigate this potential conflict, Mr. Cooper, as a fiduciary, will act in the client's best interest.

Item 5: Additional Compensation

Mr. Cooper does not receive any other economic benefit for providing advisory services in addition to advisory fees.

Item 6: Supervision

Mr. Cooper is a Principal and Chief Compliance Officer and as such has no internal supervision placed over him. He is, however, bound by our firm's Code of Ethics.

¹ Note: Our firm may, under certain circumstances, rebut the presumption that a disciplinary event is material. If an event is immaterial, we are not required to disclose it. When we review a legal or disciplinary event involving the advisor to determine whether it is appropriate to rebut the presumption of materiality, we consider all of the following factors: (1) the proximity of advisor to the advisory function; (2) the nature of the infraction that led to the disciplinary event; (3) the severity of the disciplinary sanction; and (4) the time elapsed since the date of the disciplinary event. If we conclude that the materiality presumption has been overcome, we prepare and maintain a file memorandum of our determination in our records. We follow SEC rule 204-2(a)(14)(iii) and similar state rules.