

**Item 1: Cover Page
Part 2B of Form ADV: Brochure Supplement
February 2025**



**STRONGBOX
WEALTH**

Andrew William Beil, CFP®

**StrongBox Wealth, LLC
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www.StrongBoxWealth.com

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

This brochure supplement provides information about Mr. Beil 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. Beil is available on the SEC's website at www.adviserinfo.sec.gov by searching CRD #6343436.

Item 2: Educational Background & Business Experience

Andrew William Beil, CFP®

Year of Birth: 1991

Educational Background:

- 2014: University of Missouri-Columbia, B.B.A., Finance

Business Background:

- 05/2021 – Present StrongBox Wealth, LLC; Wealth Advisor
- 02/2020 – 08/2021 Prime Capital Investment Advisors, LLC; Dir. of Financial Planning
- 06/2014 – 02/2020 American Century Investment Services, Inc.; Internal Wholesaler

Exams, Licenses & Other Professional Designations:

- 2024: Certified Exit Planning Advisor (CEPA)
- 2018: Certified Financial Planner, CFP®
- 2015: Series 7 Exam
- 2014: Series 6 & 63 Exams

Certified Exit Planning Advisor (CEPA)

The CEPA designation is made available through the Exit Planning Institute (“EPI”). Candidates must have or be: (1) 5 years of full-time or equivalent experience working directly with business owners as a financial advisor, attorney, CPA, business broker, investment banker, commercial lender, estate planner, insurance professional, business consultant or in a related capacity; (2) Undergraduate degree from a qualifying institution; if no qualifying degree must submit additional professional work experience (2 years of relevant professional experience may be substituted for each year of required undergraduate studies); and (3) Exit Planning Institute member in good standing. The CEPA Program offers professionals an innovative learning experience, performance-enhancing resources, and the strategic tools to help advance their exit planning practice.

Renewing certificants must have completed a minimum of 40 hours of exit planning related professional development, or a minimum of 30 hours of exit planning related professional development plus 10 hours of qualifying leadership, authorship, and teaching activities contributing to the exit planning profession. Qualifying leadership activities include volunteer service as a chairman, Chair-Elect, or officer for committee service to a qualifying organization other than the applicant's employer. Renewal applicants must again agree in writing that they will adhere to the EPI Professional Standards and Code of Ethics, and must re-attest that they have not been convicted of a felony related to the practice of exit planning.

CERTIFIED FINANCIAL PLANNER™, CFP®

The CFP® certification is obtained by completing an advanced college-level course of study addressing the financial planning subject areas that the CFP® Board’s studies have determined as necessary for the competent and professional delivery of financial planning services, a comprehensive certification exam and agreeing to be bound by the CFP® board’s *Standard of Professional Conduct*. As a prerequisite, the individual must have a Bachelor’s degree from a regionally accredited United States college or university (or foreign university equivalent) and have

at least 3 years of full time financial planning experience (or equivalent measured at 2,000 hours per year). This designation requires 30 hours of continuing education every 2 years and renewing an agreement to be bound by the *Standards of Professional Conduct*.

Item 3: Disciplinary Information¹

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

Item 4: Other Business Activities

Mr. Beil does not have any outside business activities to report.

Item 5: Additional Compensation

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

Item 6: Supervision

Charles Cooper III, Chief Compliance Officer of StrongBox Wealth, LLC, supervises and monitors Mr. Beil's activities on a regular basis to ensure compliance with our firm's Code of Ethics. Please contact Mr. Cooper if you have any questions about Mr. Beil's brochure supplement at 816-607-5410.

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.