

Brochure Supplement

February 2024
CRD No. 306903

Creekmur Asset Management, LLC

James H. Anderson, CFP®
Wealth Advisor

Individual CRD No. 6469376

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This brochure supplement provides information about James H. Anderson that supplements the Creekmur Asset Management, LLC brochure. You should have received a copy of that brochure. If you did not receive a brochure or if you have any questions about the contents of this supplement, please contact us at 309-925-2043 or email john@creekmurwealth.com.

Additional information about James H. Anderson is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2: Educational Background and Business Experience

James H. Anderson, CFP®

Year of Birth: 1990

A. Educational Background

2008-2010: Illinois Central College, (no degree attained)

2012: Indiana Wesleyan University, B.A. Finance

2014: Indiana Wesleyan University, Master's Certificate

B. Business Background

Creekmur Asset Management, LLC, *Wealth Advisor*, 01/2020–Present

Creekmur Inc. dba Creekmur Wealth Advisors, *Assoc. Wealth Advisor*, 10/2016–Present

Mundane Apparel, *Owner*, 01/2019–12/2023

AE Wealth Management, *Investment Adviser Representative*, 10/2017– 06/2020

Madison Avenue Securities, *Registered Representative*, 10/2017–05/2020

CFD Investments, *Registered Representative*, 04/2017–10/2017

Creative Financial Designs, *Investment Adviser Representative*, 04/2017–10/2017

Unemployed, 03/2016–10/2016

Charles Schwab & Co., Inc., *Brokerage Services Representative*, 03/2015–03/2016

Unemployed, 05/2014–03/2015

Northwest Financial, *Intern*, 03/2014–05/2014

C. Professional Designations

CERTIFIED FINANCIAL PLANNER™ (CFP®) Professional

Minimum Qualifications for The CERTIFIED FINANCIAL PLANNER™ Designation.

I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and I may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). The CFP® certification is

voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at www.cfp.net. CFP® professionals have met CFP Board's high standards for education, examination, experience, and ethics. To become a CFP® professional, an individual must fulfill the following requirements:

- Education – Earn a bachelor's degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials.
- Examination – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual's ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.
- Experience – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.
- Ethics – Satisfy the Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement and agree to be bound by CFP Board's Code of Ethics and Standards of Conduct ("Code and Standards"), which sets forth the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements to remain certified and maintain the right to continue to use the CFP Board Certification Marks:

- Ethics – Commit to complying with CFP Board's Code and Standards. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.
- Continuing Education – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

Item 3: Disciplinary Information

James Anderson does not have any disciplinary action to report. Public information concerning his registration as an investment advisor representative may be found by accessing the SEC's public disclosure site at www.adviserinfo.sec.gov.

Item 4: Other Business Activities

James Anderson is a licensed insurance agent with Creekmur Inc. dba Creekmur Wealth Advisors, through which he may recommend insurance products offered by various insurance carriers. Please be advised that there is a conflict of interest in that there is an economic incentive to recommend insurance carriers and other investment products offered through such insurance carriers. Please also be advised that John Creekmur strives to put his clients' interests first and foremost, and clients are not obligated to purchase insurance products through him.

Item 5: Additional Compensation

James Anderson receives additional compensation through his business activities described in Item 4 above.

Item 6: Supervision

James Anderson is supervised through a compliance program designed to prevent and detect violations of the federal and state securities laws. Supervision is conducted by the Chief Compliance Officer, John Creekmur, who is responsible for administering the policies and procedures. As Chief Compliance Officer, John Creekmur reviews those policies and procedures annually for their adequacy and the effectiveness of their implementation. All policies and procedures of the firm are followed.

John Creekmur can be reached at 309-925-2043.