

Matthew B. Lowery Sr., CFP®
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TownSquare Capital, LLC

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February 16, 2022

**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Matthew B. Lowery Sr. that supplements the TownSquare Capital, LLC brochure. You should have received a copy of that brochure. Contact us at 385-375-8650 if you did not receive TownSquare Capital, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Matthew B. Lowery Sr. (CRD # 4452645) is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Matthew B. Lowery Sr., CFP®

Year of Birth: 1977

Formal Education After High School:

- Virginia Polytechnic Institute and State University, BS, 2001

Business Background:

- TownSquare Capital, LLC, Investment Adviser Representative, 2/2022 - Present
- MML Investors Services LLC, Registered Representative, 9/2014 - 2/2022
- MassMutual Life Insurance Company, Agent, 8/2014 - 2/2022

Certifications: **CFP®**

CERTIFIED FINANCIAL PLANNER™ (CFP®)

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"). CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold CFP® certification. You may find more information about 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 hours 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

Form ADV Part 2B requires disclosure of certain criminal or civil actions, administrative proceedings, and self-regulatory organization proceedings, as well as certain other proceedings related to suspension or revocation of a professional attainment, designation, or license. Mr. Matthew B. Lowery Sr. has no required disclosures under this item.

Item 4 Other Business Activities

Matthew B. Lowery Sr. is separately licensed as an independent insurance agent. In this capacity, he can effect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by Mr. Lowery Sr. for insurance related activities. This presents a conflict of interest because Mr. Lowery Sr. may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.

Matthew B. Lowery Sr. is an entertainer, actor, and singer. Mr. Lowery Sr.'s duties as an entertainer, actor, and singer do not create a conflict of interest to his provision of advisory services through TownSquare Capital, LLC.

Matthew B. Lowery Sr. is the owner of SH-ML Holdings, LLC, an entity created solely for payroll purposes. Mr. Lowery Sr.'s duties as the owner of SH-ML Holdings, LLC do not create a conflict of interest to his provision of advisory services through TownSquare Capital, LLC.

Item 5 Additional Compensation

Refer to the *Other Business Activities* section above for disclosures on Mr. Lowery Sr.'s receipt of additional compensation as a result of his other business activities.

Also, refer to the *Fees and Compensation, Client Referrals and Other Compensation, and Other Financial Industry Activities and Affiliations* section(s) of TownSquare Capital, LLC's firm brochure for additional disclosures on this topic.

Item 6 Supervision

In the supervision of our associated persons, advice provided is limited based on the restrictions set by TownSquare Capital, LLC, and by internal decisions as to the types of investments that may be included in client portfolios. We conduct periodic reviews of client holdings and documented suitability information to provide reasonable assurance that the advice provided remains aligned with each client's stated investment objectives and with our internal guidelines.

My supervisor is: Staci Compagno, Chief Compliance Officer

Supervisor phone number: 385-375-8650