



Part 2B of Form ADV: *Brochure Supplement*

Mark Anthony Matos
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This brochure supplement provides information about Mark Anthony Matos that supplements the IC Advisory Services, Inc. brochure. You should have received a copy of that brochure. Please contact Douglas A. Wright (908) 707-4422 if you did not receive IC Advisory Services, Inc.'s brochure or if you have any questions about the contents of this supplement.

Additional information about Mark Anthony Matos is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Full Legal Name: Mark Anthony Matos **Born:** 1977

Education

- Florida Gulf Coast University; BS, Finance; 2006
- Florida Gulf Coast University; BS, Computer Information System; 2006

Business Experience

- IC Advisory Services, Inc.; Investment Advisor; from November 2023 to Present
- HBKS Wealth Advisors; Senior Financial Advisor; from February 2016 to January 2022
- Global Wealth Consultants; Managing Director; from March 2009 to February 2016

Designations

Mark Anthony Matos has earned the following designation(s) and is in good standing with the granting authority:

- Certified Financial Planner™; Certified Financial Planner Board of Standards, Inc.; 2013

The program is administered by the Certified Financial Planner Board of Standards Inc. Those with the CFP® designation have demonstrated competency in all areas of finance related to financial planning. Candidates complete studies on over 100 topics, including stocks, bonds, taxes, insurance, retirement planning and estate planning. In addition to passing the CFP® certification exam, candidates must also complete qualifying work experience, agree to adhere to the CFP Board's code of ethics and professional responsibility and financial planning standards and complete 30 hours of continuing education every two years.

- Chartered Life Underwriter®; The American College; 2013

The CLU® program is administered by The American College. This designation requires five core and three elective courses that focus on various areas of insurance and financial planning. Additional program requirements must be met, including a minimum of three (3) years of business experience, ethics standards and agree to comply with The American College Code of Ethics and Procedures. Continuing Education for this designation requires 30 hours every two years.

- Chartered Financial Consultant®; American College; 2013

The ChFC® program is administered by the American College. This designation has the same core curriculum as the CFP® designation, plus two or three additional elective courses that focus on various areas of personal financial planning. In addition to successful completion of an exam on areas of financial planning, including income tax, insurance, investment and estate planning, candidates are required to have a minimum of three (3) years experience in a financial industry position.

- Chartered Advisor in Philanthropy®; American College; 2013

The Chartered Advisor in Philanthropy® is administered by the American College. This designation requires passing an exam covering the areas of charitable giving strategies, gift planning for nonprofits and philanthropic planning. Candidates are required to have a minimum of three years of full-time relevant business experience and must complete continuing education every two years.

Item 3 Disciplinary Information

Mark Anthony Matos has no reportable disciplinary history.

Item 4 Other Business Activities

A. Investment-Related Activities

1. Mark Anthony Matos is not engaged in any other investment-related activities.
2. Mark Anthony Matos does not receive commissions, bonuses or other compensation on the sale of securities or other investment products.

B. Non Investment-Related Activities

Mark Anthony Matos is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of his or her time.

Item 5 Additional Compensation

Mark Anthony Matos does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Item 6 Supervision

Supervisor: Gary Medley

Title: Branch Manager

Phone Number: 239-444-5644

The supervisor listed above has the overall responsibility to oversee the activities of Mr. Matos.

The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4)-7 policies and procedures is to comply with the requirements of supervision requirements of Section 203(e)(6) of the Investment Adviser's Act ("*Act*"). The Registrant's Chief Compliance Officer, Douglas A. Wright, is primarily responsible for the implementation of the Registrant's policies and procedures. Should an employee, independent contractor, investment adviser representative, or solicitor of the Registrant have any questions regarding the applicability/relevance of the *Act*, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Mr. Wright at (908) 707-4422.