FORM ADV PART 2A / FIRM BROCHURE

ITEM 1 / COVER PAGE

Disclosure brochure.

Form ADV Part 2A

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The Colony, TX 75056

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FILING DATE April 23, 2026

This brochure provides information about the qualifications and business practices of ANCHORY, LLC. Being registered as an investment adviser does not imply a certain level of skill or training. If you have any questions about the contents of this brochure, please contact us at 817-203-7325. The information in this brochure has not been approved or verified by the United States Securities and Exchange Commission, or by any state securities authority.

ADDITIONAL INFORMATION ABOUT ANCHORY, LLC (CRD #293701) IS AVAILABLE ON THE SEC'S WEBSITE AT WWW.ADVISERINFO.SEC.GOV

02 Material Changes

ANNUAL UPDATE

The Material Changes section of this brochure will be updated annually or when material changes occur since the previous release of the Firm Brochure.

MATERIAL CHANGES SINCE THE LAST UPDATE

Since the last update of this brochure on March 30, 2026, the following has been updated:

- Item 4 to update the assets under management and correct typographical errors.

FULL BROCHURE AVAILABLE

This Firm Brochure being delivered is the complete brochure for the Firm.

03 Table of Contents

FORM ADV / PART 2A / FIRM BROCHURE

BROCHURE SUPPLEMENT / PART 2B

04 Advisory Business

FIRM DESCRIPTION

ANCHORY, LLC is registered as an Investment Adviser with the State of Texas. We were founded in January 2018 as Peak Vantage Wealth, LLC and changed our legal business name to ANCHORY, LLC in March, 2020. Niels Buksik is the principal owner of ANCHORY.

TYPES OF ADVISORY SERVICES

Asset Management

ANCHORY offers discretionary and non-discretionary asset management services to advisory Clients. ANCHORY will offer Clients ongoing asset management services through determining individual investment goals, time horizons, objectives, and risk tolerance. Investment strategies, investment selection, asset allocation, portfolio monitoring and the overall investment program will be based on the above factors.

Discretionary

When the Client provides ANCHORY discretionary authority the Client will sign a limited trading authorization or equivalent. ANCHORY will have the authority to execute transactions in the account without seeking Client approval on each transaction.

Non-Discretionary

When the Client elects to use ANCHORY on a non-discretionary basis, ANCHORY will determine the securities to be bought or sold and the amount of the securities to be bought or sold. However, ANCHORY will obtain prior Client approval on each and every transaction before executing any transaction.

As part of the recommendations provided, the Client may have a financial plan completed. This may include but is not limited to a thorough review of all applicable topics such as Wills, Estate Plans and Trusts, Investments, Taxes, Qualified Plans, Insurance, Retirement Income, Social Security, and College Planning. If a conflict of interest exists between the interests of ANCHORY and the interests of the Client, the Client is under no obligation to act upon ANCHORY's recommendation. If the Client elects to act on any of the recommendations, the Client is under no obligation to effect the transaction through ANCHORY. This service will be provided at no additional cost to the Client.

CLIENT TAILORED SERVICES AND CLIENT IMPOSED RESTRICTIONS

The goals and objectives for each Client are documented in our Client files. Investment strategies are created that reflect the stated goals and objectives. Clients may impose restrictions on investing in certain securities or types of securities.

Agreements may not be assigned without written Client consent.

WRAP FEE PROGRAMS

ANCHORY does not sponsor any wrap fee programs.

CLIENT ASSETS UNDER MANAGEMENT

ANCHORY has the following Client assets under management:

DISCRETIONARY AMOUNTS	NON-DISCRETIONARY AMOUNTS	DATE CALCULATED
$6,427,843	$0	April 23, 2026

05 Fees and Compensation

METHOD OF COMPENSATION AND FEE SCHEDULE

Asset Management

ANCHORY offers direct asset management services to advisory Clients. ANCHORY charges an annual investment advisory fee based on the total assets under management as follows:

ASSETS UNDER MANAGEMENT	ANNUAL FEE	MONTHLY FEE
$0 – $1,000,000	**1.50%**	0.375%
Over $1,000,000	**1.00%**	0.250%

This is a flat rate/breakpoint fee schedule, the entire portfolio is charged the same asset management fee. For example, a Client with $750,000 under management would pay $11,250 on an annual basis. $750,000 × 1.50% = $11,250.

The annual fee is negotiable based upon certain criteria (e.g., historical relationship, type of assets, anticipated future earning capacity, anticipated future additional assets, dollar amounts of assets to be managed, related accounts, account composition, negotiations with Clients, etc.). ANCHORY considers cash to be an asset class, and as such is included in fee calculations. Also, to be noted, at times fees will exceed the money market yield. Fees are billed monthly in advance based on the amount of assets managed as of the close of business on the last business day of the previous month. If the Account does not contain sufficient funds to pay advisory fees, ANCHORY has authority to sell or redeem securities in sufficient amounts to pay advisory fees.

Lower fees for comparable services may be available from other sources. Clients may terminate their account within five (5) business days of signing the Investment Advisory Agreement with no obligation and without penalty. After the initial five (5) business days, the agreement may be terminated by ANCHORY with thirty (30) days written notice to Client and by the Client at any time with written notice to ANCHORY. If cash and/or securities are deposited into or withdrawn from an existing account mid billing period a prorated fee will be charged for that portion of the account.

For accounts opened or closed mid-billing period, fees will be prorated based on the days services are provided during the given period. All unearned fees will be refunded to the Client. Client shall be given thirty (30) days prior written notice of any increase in fees. Any increase in fees will be acknowledged in writing by both parties before any increase in said fees occurs.

CLIENT PAYMENT OF FEES

Fees for asset management services are:

- Deducted from a designated Client account. The Client must consent in advance to direct debiting of their investment account.
- Check — to be remitted by Client to ANCHORY.

ADDITIONAL CLIENT FEES CHARGED

Custodians may charge transaction fees and other related costs on the purchases or sales of mutual funds, equities, bonds, options and exchange-traded funds. Mutual funds, money market funds and exchange-traded funds also charge internal management fees, which are disclosed in the fund's prospectus. ANCHORY does not receive any compensation from these fees. All of these fees are in addition to the management fee you pay to ANCHORY. For more details on the brokerage practices, see Item 12 of this brochure.

PREPAYMENT OF CLIENT FEES

ANCHORY does not require any prepayment of fees of more than $500 per Client and six months or more in advance.

Investment management fees are billed monthly in advance.

If the Client cancels after five (5) business days, any unearned fees will be refunded to the Client, or any unpaid earned fees will be due to ANCHORY.

EXTERNAL COMPENSATION FOR THE SALE OF SECURITIES TO CLIENTS

ANCHORY does not receive any external compensation for the sale of securities to Clients, nor do any of the investment advisor representatives of ANCHORY.

06 Performance-Based Fees and Side-by-Side Management

SHARING OF CAPITAL GAINS

Fees are not based on a share of the capital gains or capital appreciation of managed securities. ANCHORY does not use a performance-based fee structure because of the conflict of interest. Performance based compensation may create an incentive for ANCHORY to recommend an investment that may carry a higher degree of risk to the Client.

07 Types of Clients

DESCRIPTION

ANCHORY generally provides investment advice to individuals and high net worth individuals. Client relationships vary in scope and length of service.

ACCOUNT MINIMUMS

ANCHORY does not require a minimum to open or maintain an account.

08 Methods of Analysis, Investment Strategies and Risk of Loss

METHODS OF ANALYSIS

Our primary methods of investment analysis are fundamental, technical, cyclical and charting analysis.

Fundamental analysis involves analyzing individual companies and their industry groups, such as a company's financial statements, details regarding the company's product line, the experience, and expertise of the company's management, and the outlook for the company's industry. The resulting data is used to measure the true value of the company's stock compared to the current market value. The risk of fundamental analysis is that information obtained may be incorrect and the analysis may not provide an accurate estimate of earnings, which may be the basis for a stock's value. If securities prices adjust rapidly to new information, utilizing fundamental analysis may not result in favorable performance.

Technical analysis involves using chart patterns, momentum, volume, and relative strength in an effort to pick sectors that may outperform market indices. However, there is no assurance of accurate forecasts or that trends will develop in the markets we follow. In the past, there have been periods without discernible trends and similar periods will presumably occur in the future. Even where major trends develop, outside factors like government intervention could potentially shorten them. Furthermore, one limitation of technical analysis is that it requires price movement data, which can translate into price trends sufficient to dictate a market entry or exit decision. In a trendless or erratic market, a technical method may fail to identify trends requiring action. In addition, technical methods may overreact to minor price movements, establishing positions contrary to overall price trends, which may result in losses. Finally, a technical trading method may underperform other trading methods when fundamental factors dominate price moves within a given market.

Cyclical analysis is a type of technical analysis that involves evaluating recurring price patterns and trends based upon business cycles. Economic/business cycles may not be predictable and may have many fluctuations between long term expansions and contractions. The lengths of economic cycles may be difficult to predict with accuracy and therefore the risk of cyclical analysis is the difficulty in predicting economic trends and consequently the changing value of securities that would be affected by these changing trends.

Charting analysis involves the gathering and processing of price and volume information for a particular security. This price and volume information is analyzed using mathematical equations. The resulting data is then applied to graphing charts, which is used to predict future price movements based on price patterns and trends. Charts may not accurately predict future price movements. Current prices of securities may not reflect all information about the security and day-to-day changes in market prices of securities may follow random patterns and may not be predictable with any reliable degree of accuracy.

Municipal bond is a debt security issued by a state, municipality or county to finance its capital expenditures, including the construction of highways, bridges or schools. They can be thought of as loans that investors make to local governments. Municipal bonds are exempt from federal taxes and most state and local taxes, making them especially attractive to people in high income tax brackets.

Passive Investment Management & Active Investment Management

We may practice passive investment management or active investment management. Passive investing involves building portfolios that are composed of various distinct asset classes. The asset classes are weighted in a manner to achieve a desired relationship between correlation, risk and return. Funds that passively capture the returns of the desired asset classes are placed in the portfolio. The funds that are used to build passive portfolios are typically index mutual funds or exchange traded funds.

Passive investment management is characterized by low portfolio expenses (i.e. the funds inside the portfolio have low internal costs), minimal trading costs (due to infrequent trading activity), and relative tax efficiency (because the funds inside the portfolio are tax efficient and turnover inside the portfolio is minimal).

In contrast, active management involves a single manager or managers who employ some method, strategy or technique to construct a portfolio that is intended to generate returns that are greater than the broader market or a designated benchmark. Academic research indicates most active managers underperform the market.

Active investment management is a process of identifying investment managers that we believe can outperform a given market benchmark. Academic research has illustrated that the majority of managers cannot outperform their benchmark. However, academic research in this area also provides evidence that managers with a combination of lower fees, less overlap with the benchmark, and longer investment holding periods may be attractive places to look for active investment managers. We also consider the depth of the firm's research teams, track record, management tenure, and existence through a full market cycle when considering active investment managers.

INVESTMENT STRATEGY

The investment strategy for a specific Client is based upon the objectives stated by the Client during consultations. The Client may change these objectives at any time by providing written notice to ANCHORY. Each Client executes a Client profile form or similar form that documents their objectives and their desired investment strategy.

Other strategies may include long-term purchases, short-term purchases and option writing (including covered options, uncovered options or spreading strategies).

SECURITY SPECIFIC MATERIAL RISKS

All investing strategies we offer involve risk and may result in a loss of your original investment which you should be prepared to bear. Many of these risks apply equally to stocks, bonds, commodities and any other investment or security. Material risks associated with our investment strategies are listed below.

Market Risk: Market risk involves the possibility that an investment's current market value will fall because of a general market decline, reducing the value of the investment regardless of the operational success of the issuer's operations or its financial condition.

Strategy Risk: The Adviser's investment strategies and/or investment techniques may not work as intended.

Small and Medium Cap Company Risk: Securities of companies with small and medium market capitalizations are often more volatile and less liquid than investments in larger companies. Small and medium cap companies may face a greater risk of business failure, which could increase the volatility of the client's portfolio.

Turnover Risk: At times, the strategy may have a portfolio turnover rate that is higher than other strategies. A high portfolio turnover would result in correspondingly greater brokerage commission expenses and may result in the distribution of additional capital gains for tax purposes. These factors may negatively affect the account's performance.

Limited Markets: Certain securities may be less liquid (harder to sell or buy) and their prices may at times be more volatile than at other times. Under certain market conditions we may be unable to sell or liquidate investments at prices we consider reasonable or favorable, or find buyers at any price.

Concentration Risk: Certain investment strategies focus on particular asset-classes, industries, sectors or types of investment. From time to time these strategies may be subject to greater risks of adverse developments in such areas of focus than a strategy that is more broadly diversified across a wider variety of investments.

Interest Rate Risk: Bond (fixed income) prices generally fall when interest rates rise, and the value may fall below par value or the principal investment. The opposite is also generally true: bond prices generally rise when interest rates fall. In general, fixed income securities with longer maturities are more sensitive to these price changes. Most other investments are also sensitive to the level and direction of interest rates.

Legal or Legislative Risk: Legislative changes or Court rulings may impact the value of investments, or the securities' claim on the issuer's assets and finances.

Inflation: Inflation may erode the buying-power of your investment portfolio, even if the dollar value of your investments remains the same.

Risks Associated with Securities

Apart from the general risks outlined above which apply to all types of investments, specific securities may have other risks.

Commercial Paper is, in most cases, an unsecured promissory note that is issued with a maturity of 270 days or less. Being unsecured the risk to the investor is that the issuer may default.

Common stocks may go up and down in price quite dramatically, and in the event of an issuer's bankruptcy or restructuring could lose all value. A slower-growth or recessionary economic environment could have an adverse effect on the price of all stocks.

Corporate Bonds are debt securities to borrow money. Generally, issuers pay investors periodic interest and repay the amount borrowed either periodically during the life of the security and/or at maturity. Alternatively, investors can purchase other debt securities, such as zero coupon bonds, which do not pay current interest, but rather are priced at a discount from their face values and their values accrete over time to face value at maturity. The market prices of debt securities fluctuate depending on such factors as interest rates, credit quality, and maturity. In general, market prices of debt securities decline when interest rates rise and increase when interest rates fall. The longer the time to a bond's maturity, the greater its interest rate risk.

Bank Obligations including bonds and certificates of deposit may be vulnerable to setbacks or panics in the banking industry. Banks and other financial institutions are greatly affected by interest rates and may be adversely affected by downturns in the U.S. and foreign economies or changes in banking regulations.

Municipal Bonds are debt obligations generally issued to obtain funds for various public purposes, including the construction of public facilities. Municipal bonds pay a lower rate of return than most other types of bonds. However, because of a municipal bond's tax-favored status, investors should compare the relative after-tax return to the after-tax return of other bonds, depending on the investor's tax bracket. Investing in municipal bonds carries the same general risks as investing in bonds in general. Those risks include interest rate risk, reinvestment risk, inflation risk, market risk, call or redemption risk, credit risk, liquidity and valuation risk.

Options and other derivatives carry many unique risks, including time-sensitivity, and can result in the complete loss of principal. While covered call writing does provide a partial hedge to the stock against which the call is written, the hedge is limited to the amount of cash flow received when writing the option. When selling covered calls, there is a risk the underlying position may be called away at a price lower than the current market price.

Exchange Traded Funds prices may vary significantly from the Net Asset Value due to market conditions. Certain Exchange Traded Funds may not track underlying benchmarks as expected. ETFs are also subject to the following risks: (i) an ETF's shares may trade at a market price that is above or below their net asset value; (ii) trading of an ETF's shares may be halted if the listing exchange's officials deem such action appropriate, the shares are de-listed from the exchange, or the activation of market-wide "circuit breakers" (which are tied to large decreases in stock prices) halts stock trading generally. The Adviser has no control over the risks taken by the underlying funds in which client's invest.

Investment Companies Risk: When a client invests in open end mutual funds or ETFs, the client indirectly bears its proportionate share of any fees and expenses payable directly by those funds. Therefore, the client will incur higher expenses, many of which may be duplicative. In addition, the client's overall portfolio may be affected by losses of an underlying fund and the level of risk arising from the investment practices of an underlying fund (such as the use of derivatives).

Alternative Investment Risk: Investing in alternative investments is speculative, not suitable for all clients, and intended for experienced and sophisticated investors who are willing to bear the high economic risks of the investment, which can include: Loss of all or a substantial portion of the investment due to leveraging, short-selling or other speculative investment practices, Lack of liquidity in that there may be no secondary market for the fund and none expected to develop, Volatility of returns, Absence of information regarding valuations and pricing, Delays in tax reporting, and Less regulation and higher fees than mutual funds.

09 Disciplinary Information

CRIMINAL OR CIVIL ACTIONS

ANCHORY and its management have not been involved in any criminal or civil action.

ADMINISTRATIVE ENFORCEMENT PROCEEDINGS

ANCHORY and its management have not been involved in administrative enforcement proceedings.

SELF-REGULATORY ORGANIZATION ENFORCEMENT PROCEEDINGS

ANCHORY and its management have not been involved in any self-regulatory organizational enforcement proceedings that are material to a Client's or prospective Client's evaluation of ANCHORY or the integrity of its management.

10 Other Financial Industry Activities and Affiliations

BROKER-DEALER OR REPRESENTATIVE REGISTRATION

ANCHORY is not registered as a broker-dealer and no affiliated representatives of ANCHORY are registered representatives of a broker-dealer.

FUTURES OR COMMODITY REGISTRATION

Neither ANCHORY nor its affiliated representatives are registered or have an application pending to register as a futures commission merchant, commodity pool operator, or a commodity trading advisor.

MATERIAL RELATIONSHIPS MAINTAINED BY THIS ADVISORY BUSINESS AND CONFLICTS OF INTEREST

Niels Buksik is licensed to sell life and health insurance, however he no longer sells insurance products and will not sell insurance products to clients or prospective clients of ANCHORY.

RECOMMENDATIONS OR SELECTIONS OF OTHER INVESTMENT ADVISORS AND CONFLICTS OF INTEREST

ANCHORY does not select or recommend other investment advisors.

11 Code of Ethics, Participation or Interest in Client Transactions and Personal Trading

CODE OF ETHICS DESCRIPTION

The affiliated persons (affiliated persons include employees and/or independent contractors) of ANCHORY have committed to a Code of Ethics ("Code"). The purpose of our Code is to set forth standards of conduct expected of ANCHORY affiliated persons and addresses conflicts that may arise. The Code defines acceptable behavior for affiliated persons of ANCHORY. The Code reflects ANCHORY and its supervised persons' responsibility to act in the best interest of their Client.

One area which the Code addresses is when affiliated persons buy or sell securities for their personal accounts and how to mitigate any conflict of interest with our Clients.

The Code applies to "access" persons. "Access" persons are affiliated persons who have access to non-public information regarding any Clients' purchase or sale of securities, or non-public information regarding the portfolio holdings of any reportable fund, who are involved in making securities recommendations to Clients, or who have access to such recommendations that are non-public.

ANCHORY will provide a copy of the Code of Ethics to any Client or prospective Client upon request.

INVESTMENT RECOMMENDATIONS INVOLVING A MATERIAL FINANCIAL INTEREST AND CONFLICT OF INTEREST

ANCHORY and its affiliated persons do not recommend to Clients securities in which we have a material financial interest.

ADVISORY FIRM PURCHASE OF SAME SECURITIES RECOMMENDED TO CLIENTS AND CONFLICTS OF INTEREST

ANCHORY and its affiliated persons may buy or sell securities that are also held by Clients. In order to mitigate conflicts of interest such as trading ahead of Client transactions, affiliated persons are required to disclose all reportable securities transactions as well as provide ANCHORY with copies of their brokerage statements.

The Chief Compliance Officer of ANCHORY is Niels Buksik. He reviews all trades of the affiliated persons each quarter. The personal trading reviews ensure that the personal trading of affiliated persons does not affect the markets and that Clients of the firm receive preferential treatment over associated persons' transactions.

CLIENT SECURITIES RECOMMENDATIONS OR TRADES AND CONCURRENT ADVISORY FIRM SECURITIES TRANSACTIONS AND CONFLICTS OF INTEREST

ANCHORY does not have a material financial interest in any securities being recommended. However, affiliated persons may buy or sell securities at the same time they buy or sell securities for Clients. In order to mitigate conflicts of interest such as front running, affiliated persons are required to disclose all reportable securities transactions as well as provide ANCHORY with copies of their brokerage statements.

The Chief Compliance Officer of ANCHORY is Niels Buksik. He reviews all trades of the affiliated persons each quarter. The personal trading reviews ensure that the personal trading of affiliated persons does not affect the markets and that Clients of the firm receive preferential treatment over associated persons' transactions.

12 Brokerage Practices

FACTORS USED TO SELECT BROKER-DEALERS FOR CLIENT TRANSACTIONS

ANCHORY will recommend the use of a particular broker-dealer based on their duty to seek best execution for the client, meaning they have an obligation to obtain the most favorable terms for a client under the circumstances. The determination of what may constitute best execution and price in the execution of a securities transaction by a broker involves a number of considerations and is subjective. Factors affecting brokerage selection include the overall direct net economic result to the portfolios, the efficiency with which the transaction is affected, the ability to effect the transaction where a large block is involved, the operational facilities of the broker-dealer, the value of an ongoing relationship with such broker and the financial strength and stability of the broker. ANCHORY will select appropriate brokers based on a number of factors including but not limited to their relatively low transaction fees, reporting ability, execution capability (speed and accuracy), financial stability and reputation, access to markets, technology and reporting platforms, quality of client service and availability of investment research and other brokerage services. ANCHORY relies on its broker to provide its execution services at the best prices available. Lower fees for comparable services may be available from other sources. Clients pay for any and all custodial fees in addition to the advisory fee charged by ANCHORY. ANCHORY does not receive any portion of the trading fees.

ANCHORY will recommend the use of Charles Schwab and Altruist.

Research and Other Soft Dollar Benefits

The Securities and Exchange Commission defines soft dollar practices as arrangement under which products or services other than execution services are obtained by ANCHORY from or through a broker-dealer in exchange for directing Client transactions to the broker-dealer. Although ANCHORY has no formal soft dollar arrangements, ANCHORY may receive products, research and/or other services from custodians or broker-dealers connected to client transactions or "soft dollar benefits". As permitted by Section 28(e) of the Securities Exchange Act of 1934, ANCHORY receives economic benefits as a result of commissions generated from securities transactions by the custodian or broker-dealer from the accounts of ANCHORY. ANCHORY cannot ensure that a particular client will benefit from soft dollars or the client's transactions paid for the soft dollar benefits. ANCHORY does not seek to proportionately allocate benefits to client accounts to any soft dollar benefits generated by the accounts.

A conflict of interest exists when ANCHORY receives soft dollars which could result in higher commissions charged to Clients. This conflict is mitigated by the fact that ANCHORY has a fiduciary responsibility to act in the best interest of its Clients and the services received are beneficial to all Clients.

Brokerage for Client Referrals

ANCHORY does not receive client referrals from any custodian or third party in exchange for using that broker-dealer or third party.

Directed Brokerage

ANCHORY does not allow directed brokerage accounts. Not all advisors require their clients to direct brokerage.

AGGREGATING SECURITIES TRANSACTIONS FOR CLIENT ACCOUNTS

Generally, we combine multiple orders for shares of the same securities purchased for advisory accounts we manage (this practice is commonly referred to as "block trading"). We will then distribute a portion of the shares to participating accounts in a fair and equitable manner. The distribution of the shares purchased is typically proportionate to the size of the account, but it is not based on account performance or the amount or structure of management fees. Subject to our discretion, regarding particular circumstances and market conditions, when we combine orders, each participating account pays an average price per share for all transactions and pays a proportionate share of all transaction costs. Accounts owned by our firm or persons associated with our firm may participate in block trading with your accounts; however, they will not be given preferential treatment.

13 Review of Accounts

SCHEDULE FOR PERIODIC REVIEW OF CLIENT ACCOUNTS OR FINANCIAL PLANS AND ADVISORY PERSONS INVOLVED

Client accounts with the Investment Management Service will be reviewed regularly on a quarterly basis by Niels Buksik, CEO and Founder and CCO. The account is reviewed with regards to the client's investment policies and risk tolerance levels. Events that may trigger a special review would be unusual performance, addition or deletions of client imposed restrictions, excessive draw-down, volatility in performance, or buy and sell decisions from the firm or per client's needs.

REVIEW OF CLIENT ACCOUNTS ON NON-PERIODIC BASIS

Clients will receive trade confirmations from the broker(s) for each transaction in their accounts as well as monthly or quarterly statements and annual tax reporting statements from their custodian showing all activity in the accounts, such as receipt of dividends and interest.

CONTENT OF CLIENT PROVIDED REPORTS AND FREQUENCY

ANCHORY will provide written reports to Investment Management clients on a quarterly basis. We urge clients to compare these reports against the account statements they receive from their custodian.

14 Client Referrals and Other Compensation

ECONOMIC BENEFITS PROVIDED TO THE ADVISORY FIRM FROM EXTERNAL SOURCES AND CONFLICTS OF INTEREST

ANCHORY receives additional economic benefits from external sources as described above in Item 12.

ADVISORY FIRM PAYMENTS FOR CLIENT REFERRALS

ANCHORY does not compensate for Client referrals.

15 Custody

ACCOUNT STATEMENTS

All assets are held at qualified custodians, which means the custodians provide account statements directly to Clients at their address of record at least quarterly. Clients are urged to carefully compare the account statements received directly from their custodians to any documentation or reports prepared by ANCHORY.

If ANCHORY is authorized or permitted to deduct fees directly from the account by the custodian:

- ANCHORY will provide the Client with an invoice concurrent to instructing the custodian to deduct the fee stating the amount of the fee, the formula used to calculate the fee, the amount of assets under management the fee is based on and the time period covered by the fee;
- ANCHORY will obtain written authorization signed by the Client allowing the fees to be deducted; and
- The Client will receive quarterly statements directly from the custodian which disclose the fees deducted.

16 Investment Discretion

DISCRETIONARY AUTHORITY FOR TRADING

ANCHORY requires discretionary authority to manage securities accounts on behalf of Clients. ANCHORY has the authority to determine, without obtaining specific Client consent, the securities to be bought or sold, and the amount of the securities to be bought or sold. Client will authorize ANCHORY discretionary authority as stated within the Investment Advisory Agreement.

ANCHORY allows Clients to place certain restrictions, as outlined in the Client's Investment Policy Statement or similar document. These restrictions must be provided to ANCHORY in writing.

The Client approves the custodian to be used. ANCHORY does not receive any portion of the transaction fees or commissions paid by the Client to the custodian.

17 Voting Client Securities

PROXY VOTES

ANCHORY does not vote proxies on securities. Clients are expected to vote their own proxies. The Client will receive their proxies directly from the custodian of their account or from a transfer agent.

When assistance on voting proxies is requested, ANCHORY will provide recommendations to the Client. If a conflict of interest exists, it will be disclosed to the Client. If the Client requires assistance or has questions, they can reach out to the investment advisor representatives of the firm at the contact information on the cover page of this document.

18 Financial Information

BALANCE SHEET

A balance sheet is not required to be provided to Clients because ANCHORY does not serve as a custodian for Client funds or securities and ANCHORY does not require prepayment of fees of more than $500 per Client and six months or more in advance.

FINANCIAL CONDITIONS REASONABLY LIKELY TO IMPAIR ADVISORY FIRM'S ABILITY TO MEET COMMITMENTS TO CLIENTS

ANCHORY has no condition that is reasonably likely to impair our ability to meet contractual commitments to our Clients.

BANKRUPTCY PETITIONS DURING THE PAST TEN YEARS

ANCHORY has not had any bankruptcy petitions in the last ten years.

19 Requirements for State Registered Advisors

PRINCIPAL EXECUTIVE OFFICERS AND MANAGEMENT PERSONS

The education and business background for all executive officers and management persons can be found in the Part 2B of this Brochure.

OUTSIDE BUSINESS ACTIVITIES

The outside business activities for all executive officers and management persons can be found in the Part 2B of this Brochure.

PERFORMANCE BASED FEE DESCRIPTION

Neither ANCHORY nor its management receive performance based fees. Please see Item 6 of the ADV 2A for more information.

DISCLOSURE OF MATERIAL FACTS RELATED TO ARBITRATION OR DISCIPLINARY ACTIONS INVOLVING MANAGEMENT PERSONS

The disclosure of material facts related to arbitration or disciplinary actions for all executive officers and management persons can be found in the Part 2B of this Brochure.

MATERIAL RELATIONSHIP MAINTAINED BY THIS ADVISORY BUSINESS OR MANAGEMENT PERSONS WITH ISSUERS OF SECURITIES

There are no material relationships with issuers of securities to disclose.

ANCHORY®

FORM ADV PART 2B / BROCHURE SUPPLEMENT

ITEM 1 / COVER PAGE

Supervised person.

Niels Buksik, CFP®

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EMAIL	niels@anchory.com
FILING DATE	April 23, 2026

This brochure supplement provides information about Niels Buksik and supplements the ANCHORY, LLC brochure. You should have received a copy of that brochure. Please contact Niels Buksik if you did not receive the brochure or if you have any questions about the contents of this supplement.

ADDITIONAL INFORMATION ABOUT NIELS BUKSIK (CRD #5452418) IS AVAILABLE ON THE SEC'S WEBSITE AT WWW.ADVISERINFO.SEC.GOV

02 Educational Background and Business Experience

PRINCIPAL EXECUTIVE OFFICER — NIELS BUKSIK, CFP®

- Year of birth: 1983

Educational Background

- University of Texas at Arlington; BBA in Finance; 2006
- University of Texas at Arlington; BBA in International Business; 2006

Business Experience

- ANCHORY, LLC; CEO / Founder / CCO; 02/2018 – Present
- Belpointe Asset Management LLC; 11/2024 – 07/2025
- Morgan Stanley Private Bank, N.A.; Financial Advisor Associate; 04/2016 – 02/2018
- Morgan Stanley Smith Barney LLC; Financial Advisor Associate; 03/2016 – 02/2018
- USAA Financial Advisors, Inc.; Registered Representative; 07/2012 – 03/2016
- USAA Financial Planning Services; Investment Advisor Representative; 08/2012 – 04/2016
- Rex Co.; Tennis Professional; 02/2012 – 01/2016

PROFESSIONAL CERTIFICATIONS

Niels Buksik has earned certifications and credentials that are required to be explained in further detail.

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.

03 Disciplinary Information

A. Mr. Buksik has never been involved in a criminal or civil action in a domestic, foreign or military court of competent jurisdiction for which he:

1. Was convicted of, or pled guilty or nolo contender ("no contest") to (a) any felony; (b) misdemeanor that involved investments or an investment-related business, fraud, false statement or omissions, wrongful taking of property, bribery, perjury, counterfeiting, or extortion; or (c) a conspiracy to commit any of these offenses;
2. Is the named subject of a pending criminal proceeding that involves an investment-related business, fraud, false statements or omissions, wrongful taking of property, bribery, perjury, forgery, counterfeiting, extortion, or a conspiracy to commit any of these offenses;
3. Was found to have been involved in a violation of an investment-related statute or regulation; or
4. Was the subject of any order, judgement or decree permanently or temporarily enjoining, or otherwise limiting, him from engaging in any investment related activity, or from violating any investment-related statute, rule, or order.

B. Mr. Buksik never had an administrative proceeding before the SEC, any other federal regulatory agency, any state regulatory agency, or any foreign financial regulatory authority in which he:

1. Was found to have caused an investment-related business to lose its authorization to do business; or the subject of an order by the agency or authority;
2. Was found to have been involved in a violation of an investment-related statute or regulation or was the subject of an order by the agency or authority (a) denying, suspending or revoking the authorization of the supervised person to act in an investment-related business; (b) barring or suspending his association with an investment-related business; (c) otherwise significantly limiting his investment-related activities; or (d) imposing a civil money penalty of more than $2,500 on him.

C. Mr. Buksik has never been the subject of a self-regulatory organization (SRO) proceeding in which he:

1. Was found to have caused an investment-related business to lose its authorization to do business; or
2. Was found to have been involved in a violation of the SRO's rules and was: (a) barred or suspended from membership or from association with other members, or was expelled from membership; (b) otherwise significantly limited from investment-related activities; or (c) fined more than $2,500.

D. Mr. Buksik has not been involved in any other hearing or formal adjudication in which a professional attainment, designation, or license of the supervised person was revoked or suspended because of a violation of rules relating to professional conduct.

04 Other Business Activities

Niels Buksik is licensed to sell life and health insurance, however, he no longer sells insurance products and will not sell insurance products to clients or prospective clients of ANCHORY.

05 Additional Compensation

Niels Buksik does not receive any economic benefit from any person, company, or organization in exchange for providing clients advisory service through ANCHORY. He does not receive any performance-based fees and does not receive any additional compensation for performing advisory services other than what is disclosed in Item 5 of Part 2A.

06 Supervision

Niels Buksik is the CEO, Founder and Chief Compliance Officer of ANCHORY. He is solely responsible for all supervision and formulation and monitoring of investment advice offered to Clients. He will adhere to the policies and procedures as described in the firm's Compliance Manual. He can be reached at 817-203-7325.

07 Requirements for State-Registered Advisors

A. Niels Buksik has not been involved in any of the following:

1. An award or otherwise been found liable in an arbitration claim alleging damages in excess of $2,500 involving any of the following:
    - i. An investment or an investment-related business or activity;
    - ii. Fraud, false statement(s) or omissions;
    - iii. Theft, embezzlement or other wrongful taking of property;
    - iv. Bribery, forgery, counterfeiting, or extortion;
    - v. Dishonest, unfair or unethical practices.
2. An award or otherwise been found liable in a civil, self-regulatory organization, or administrative proceeding involving any of the following:
    - i. An investment or an investment-related business or activity;
    - ii. Fraud, false statement(s) or omissions;
    - iii. Theft, embezzlement or other wrongful taking of property;
    - iv. Bribery, forgery, counterfeiting, or extortion;
    - v. Dishonest, unfair or unethical practices.

B. Niels Buksik has never been the subject of a bankruptcy petition.