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Form ADV Part 2B

Brochure supplement · Cooper Taylor

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This brochure supplement provides information about Cooper Taylor that supplements the Sounding Line Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Cooper Taylor if you did not receive Sounding Line Wealth Management, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Cooper Taylor is also available on the SEC's website at www.adviserinfo.sec.gov.

Sounding Line Wealth Management, LLC

Form ADV Part 2B – Individual Disclosure Brochure

for

Cooper Taylor

Personal CRD Number: 8015246

Investment Adviser Representative

Sounding Line Wealth Management, LLC
1603 Hermitage Ct
Durham, NC 27707
(678) 982-7750
ct@soundinglinewealth.com

UPDATED: 06/18/2026

Item 2: Educational Background and Business Experience

Name: Cooper Taylor **Born:** 1990

Educational Background and Professional Designations:

Education:

MBA Business, Indiana University - 2017
BSBA Business, University of Richmond - 2012

Designations:

CFA – Chartered Financial Analyst

The Chartered Financial Analyst (CFA) charter is a globally respected, graduate-level investment credential established in 1962 and awarded by CFA Institute - the largest global association of investment professionals.

There are currently more than 90,000 CFA charterholders working in 134 countries. To earn the CFA charter, candidates must: 1) pass three sequential, six-hour examinations; 2) have at least four years of qualified professional investment experience; 3) join CFA Institute as members; and 4) commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct.

High Ethical Standards
The CFA Institute Code of Ethics and Standards of Professional Conduct, enforced through an active professional conduct program, require CFA charterholders to:

- Place their clients' interests ahead of their own
- Maintain independence and objectivity
- Act with integrity
- Maintain and improve their professional competence
- Disclose conflicts of interest and legal matters

Global Recognition
Passing the three CFA exams is a difficult feat that requires extensive study (successful candidates report spending an average of 300 hours of study per level). Earning the CFA charter demonstrates mastery of many of the advanced skills needed for investment analysis and decision making in today's quickly evolving global financial industry. As a result, employers and clients are increasingly seeking CFA charterholders-often making the charter a prerequisite for employment.

Additionally, regulatory bodies in 22 countries and territories recognize the CFA charter as a proxy for meeting certain licensing requirements, and more than 125 colleges and universities around the world have incorporated a majority of the CFA Program curriculum into their own finance courses.

Comprehensive and Current Knowledge
The CFA Program curriculum provides a comprehensive framework of knowledge for investment decision making and is firmly grounded in the knowledge and skills used every day in the investment profession. The three levels of the CFA Program test a proficiency with a wide range of fundamental and advanced investment topics, including ethical and professional standards, fixed-income and equity analysis, alternative and derivative investments, economics, financial reporting standards, portfolio management, and wealth planning.

The CFA Program curriculum is updated every year by experts from around the world to ensure that candidates learn the most relevant and practical new tools, ideas, and investment and wealth management skills to reflect the dynamic and complex nature of the profession.

To learn more about the CFA charter, visit www.cfainstitute.org.

Business Background:

06/2026 - Present	Managing Member and Chief Compliance Officer Sounding Line Wealth Management, LLC
02/2022 – 07/2026	Vice President Salem Investment Counselors
09/2018 - 01/2022	Investment Associate University of Michigan Investment Office
09/2016 - 05/2018	Graduate Student Indiana University
06/2016 - 09/2016	Player National Football League - New York Giants

Item 3: Disciplinary Information

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

Item 4: Other Business Activities

Cooper Taylor is not engaged in any investment-related business or occupation (other than this advisory firm).

Item 5: Additional Compensation

Cooper Taylor does not receive any economic benefit from any person, company, or organization, other than Sounding Line Wealth Management, LLC in exchange for providing clients advisory services through Sounding Line Wealth Management, LLC.

Item 6: Supervision

As the Chief Compliance Officer of Sounding Line Wealth Management, LLC, Cooper Taylor supervises all activities of the firm. Cooper Taylor's contact information is on the cover page of this disclosure document. Cooper Taylor adheres to applicable regulatory requirements, together with all policies and procedures outlined in the firm's code of ethics and compliance manual.

Item 7: Requirements For State Registered Advisers

This disclosure is required by state securities authorities and is provided for your use in evaluating this investment advisor representative's suitability.

A. Cooper Taylor has NOT been involved in any of the events listed below.

1. An award or otherwise being found liable in an arbitration claim alleging damages in excess of $2,500, involving any of the following:
    a) an investment or an investment-related business or activity;
    b) fraud, false statement(s), or omissions;
    c) theft, embezzlement, or other wrongful taking of property;
    d) bribery, forgery, counterfeiting, or extortion; or
    e) dishonest, unfair, or unethical practices.

2. An award or otherwise being found liable in a civil, self-regulatory organization, or administrative proceeding involving any of the following:
    a) an investment or an investment-related business or activity;

b) fraud, false statement(s), or omissions;
c) theft, embezzlement, or other wrongful taking of property;
d) bribery, forgery, counterfeiting, or extortion; or
e) dishonest, unfair, or unethical practices.

B. Cooper Taylor has NOT been the subject of a bankruptcy.