

This brochure supplement provides information about BRADLEY STEPHENS that supplements the Mount Tamalpais Asset Management, LLC brochure. You should have received a copy of that brochure. Please contact BRADLEY STEPHENS if you did not receive Mount Tamalpais Asset Management, LLC's brochure or if you have any questions about the contents of this supplement.

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



TAMALPAIS
ASSET MANAGEMENT

Mount Tamalpais Asset Management, LLC
dba
Tamalpais Asset Management, LLC

Form ADV Part 2B – Individual Disclosure Brochure

For

Bradley Stephens
Personal CRD Number: 2296026
Investment Adviser Representative

Tamalpais Asset Management, LLC
900 Larkspur Landing Circle
Suite 100
Larkspur, CA 94939
(650) 245-0737
brad@tamalpaisam.com

UPDATED: 10/24/2023

Item 2: Educational Background and Business Experience

Name: BRADLEY STEPHENS

Born: 1968

Educational Background and Professional Designations:

Education:

BS in Business Administration Marketing, San Diego State University - 1992

Business Background:

06/2023 - Present	Retirement Plan Consultant Mount Tamalpais Asset Management, LLC
05/2014 - 03/2022	Senior Institutional Relationship Manager Nationwide Financial
05/2008 – 12/2013	Investment Strategy Consultant Highmark Capital Management
06/2004 - 05/2008	Investment Analyst Union Bank of California
05/2003 – 01/2004	Sales Specialist Farmers Financial Solutions
02/2002 – 01/2003	Sales Associate RBC Dain Rauscher, Inc.
09/1999 - 02/2002	Sales Associate US Bancorp Piper Jaffery
11/1991 - 09/1999	Sales Associate Franklin Templeton

Item 3: Disciplinary Information

In January of 2003, an unapproved correspondence was sent via fax. No compliance approved correspondence sent via fax. Unauthorized use of principal satrom to send correspondence via fax.

Item 4: Other Business Activities

BRADLEY STEPHENS is a Financial Representative of Calamar Financial Group. From time to time, he will offer clients advice or products from those activities.

Item 5: Additional Compensation

BRADLEY STEPHENS does not receive any economic benefit from any person, company, or organization, other than Mount Tamalpais Asset Management, LLC in exchange for providing clients advisory services through Mount Tamalpais Asset Management, LLC.

Item 6: Supervision

As a representative of Tamalpais Asset Management, LLC, BRADLEY STEPHENS is supervised by Michael Bristow, the firm's Chief Compliance Officer. Michael Bristow is responsible for ensuring that BRADLEY STEPHENS adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Michael Bristow is (415) 722-2188.

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. BRADLEY STEPHENS 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. BRADLEY STEPHENS has NOT been the subject of bankruptcy.