



Tower Bridge Advisors

Tower Bridge Advisors, Inc.
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Brochure Supplement (Part 2B of Form ADV)

This Brochure Supplement provides information about the following individuals who provide investment advice on behalf of Tower Bridge Advisors:

- Michael Joseph Adams
- Christopher Murray Crooks
- Nicholas Robert Filippo
- Shawn Michael Gallagher
- Christopher Eugene Gildea
- Jeffrey Kachel
- James Maurice Meyer
- Daniel Patrick Rodan

This information supplements the Tower Bridge Advisors Form ADV, Part 2A Brochure that you should have already received. Please contact Jeffrey Kachel, jkachel@towerbridgeadvisors.com, if you did not receive Tower Bridge Advisors' Brochure or if you have any questions about the contents of this Brochure Supplement. Additional information about certain of the individuals named in this Brochure Supplement is available on the SEC's website at www.adviserinfo.sec.gov. Information about referenced industry designations is included at the end of the Brochure Supplement.

This Brochure Supplement was last updated January 23, 2026

Michael Joseph Adams

Educational Background:

- BS Finance, LaSalle University, 1982
- MBA, LaSalle University, 1988

Business Experience:

- Senior Portfolio Manager, Tower Bridge Advisors, Inc., 2020 – date
- Senior Vice President, BB&T Securities, LLC, 2016 - 2020
- Portfolio Manager, Sterling Advisors, f/k/a Stratton Management Company, 1998 - 2016

Year of Birth: 1956

Disciplinary Information: None

Other Business Activities: None

Additional Compensation: None

Supervision: Michael Joseph Adams' advisory activities are supervised by Christopher Murray Crooks, Tower Bridge Advisors' Chief Investment Officer. Mr. Crooks reviews Mr. Adams' work through internal reporting and Investment Committee meetings. You can contact Mr. Crooks by telephone, at 610.260.2200, or by e-mail at ccrooks@towerbridgeadvisors.com.

Christopher Murray Crooks, CFA[®], CFP[®]

Educational Background:

- BS, Chemical Engineering, Drexel University, 1989
- MBA, Villanova University, 1994

Business Experience:

- Chief Investment Officer, Director, Principal, Tower Bridge Advisors, Inc., 2026 - date
- Co-Chief Investment Officer, Director, Principal, Tower Bridge Advisors, Inc., 2023 - 2025
- Senior Portfolio Manager, Tower Bridge Advisors, Inc., 2020 – date
- Financial Advisor, Bank of America Corp., f/k/a Merrill Lynch, Pierce, Fenner & Smith, 2019 - 2020
- Senior Portfolio Manager, AlphaOne Capital Partners LLC, 2009 - 2019
- Portfolio Manager, Oppenheimer Funds, 2003 - 2009

Year of Birth: 1966

Disciplinary Information: None

Other Business Activities: None

Additional Compensation: None

Supervision: Christopher Murray Crooks' advisory activities are supervised by Christopher Eugene Gildea, Tower Bridge Advisors' Chief Executive Officer. Mr. Gildea reviews Mr. Crooks' work through internal reporting and Investment Committee meetings. You can contact Mr. Gildea by phone, at 610.260.2200, or by e-mail at cgildea@towerbridgeadvisors.com.

Nicholas Robert Filippo

Educational Background:

- BA, Mathematics, University of Chicago, 1981
- MBA, Northwestern University, 1990

Business Experience:

- Chief Marketing Officer, Senior Relationship Manager, Director, Principal, Tower Bridge Advisors, Inc., 2024 – date
- Vice President, Tower Bridge Advisors, Inc., 2012 – 2024
- Senior Portfolio Manager, Tower Bridge Advisors, Inc., 2012 – date
- President, Cipperman Compliance, 2009 - 2012
- Vice President, Verdis Investment Management, 2006 - 2008
- Vice President, Milestone Wealth Management, 2002 - 2006
- Senior Vice President, SEI Investments, 1993 - 2002

Year of Birth: 1959

Disciplinary Information: None

Other Business Activities: None

Additional Compensation: None

Supervision: Nicholas Robert Filippo's advisory activities are supervised by Christopher Murray Crooks, Tower Bridge Advisors' Chief Investment Officer. Mr. Crooks reviews Mr. Filippo's work through internal reporting and Investment Committee meetings. You can contact Mr. Crooks by telephone, at 610.260.2200, or by e-mail at ccrooks@towerbridgeadvisors.com.

Shawn Michael Gallagher, CFA®

Educational Background:

- BS, Finance, The Pennsylvania State University, 2003

Business Experience:

- Senior Portfolio Manager, Principal, Tower Bridge Advisors, Inc., 2026 – date
- Senior Portfolio Manager, Tower Bridge Advisors, Inc., 2024 – 2025
- Executive Director and Portfolio Manager, Sterling Capital, f/k/a Stratton Management Company, 2005 - 2024
- Financial Analyst, AT&T Corporation, 2003 - 2005

Year of Birth: 1980

Disciplinary Information: None

Other Business Activities: None

Additional Compensation: None

Supervision: Shawn Michael Gallagher's advisory activities are supervised by Christopher Murray Crooks, Tower Bridge Advisors' Chief Investment Officer. Mr. Crooks reviews Mr. Gallagher's work through internal reporting and Investment Committee meetings. You can contact Mr. Crooks by telephone, at 610.260.2200, or by e-mail at ccrooks@towerbridgeadvisors.com.

Christopher Eugene Gildea

Educational Background:

- BS, Economics and Operations Management, Boston College, 1992
- JD, Suffolk University Law School, 1997
- MBA, Purdue University, 2004

Business Experience:

- Chief Executive Officer, Director, Secretary, Principal, Tower Bridge Advisors, Inc., 2026 – date
- Co-Chief Investment Officer, Chief Compliance Officer, Director, Secretary, Principal, Tower Bridge Advisors, Inc., 2023 - 2025
- Chief Compliance Officer, Director, Secretary, Principal, Tower Bridge Advisors, Inc., 2021 - 2023
- Senior Portfolio Manager, Tower Bridge Advisors, Inc., 2018 – date
- Portfolio Manager, Portview Partners / Portsmouth Capital Fund, 2014 – 2018
- Analyst / Portfolio Manager, Merit Investment Management, 2010 – 2014
- Analyst, Gardner Lewis Asset Management, 2004 - 2010

Year of Birth: 1969

Disciplinary Information: None

Other Business Activities: None

Additional Compensation: None

Supervision: Christopher Eugene Gildea's advisory activities are supervised by Christopher Murray Crooks, Tower Bridge Advisors' Chief Investment Officer. Mr. Crooks reviews Mr. Gildea's work through internal reporting and Investment Committee meetings. You can contact Mr. Crooks by telephone, at 610.260.2200, or by e-mail at ccrooks@towerbridgeadvisors.com.

Jeffrey Kachel

Educational Background:

- BS, Accounting, West Chester University, 1991
- MBA, Widener University, 1998

Business Experience:

- Chief Compliance Officer, Chief Financial Officer, Chief Technology Officer, Principal, Director, Portfolio Manager Tower Bridge Advisors, Inc., 2026 – date
- Chief Financial Officer, Chief Technology Officer, Principal, Director, Tower Bridge Advisors, Inc., 2006 – 2025
- Portfolio Manager, Tower Bridge Advisors, Inc., 2025 - date
- Chief Financial Officer, Chief Technology Officer, Director, Principal, Tower Bridge Advisors, Inc., 2004 - 2006
- Wrap Program Portfolio Manager, Research Analyst, Pilgrim Baxter & Associates, Ltd., 2001 - 2004
- Manager of Operations, Research Analyst, Pilgrim Baxter & Associates, Ltd., 1995 – 2001
- Investment Accountant, Financial Analyst, PNC Bank, 1992 - 1995

Year of Birth: 1969

Disciplinary Information: None

Other Business Activities: None

Additional Compensation: None

Supervision: Jeffrey Kachel's advisory activities are supervised by Christopher Murray Crooks, Tower Bridge Advisors' Chief Investment Officer. Mr. Crooks reviews Mr. Kachel's work through internal reporting and Investment Committee meetings. You can contact Mr. Crooks by telephone, at 610.260.2200, or by e-mail at ccrooks@towerbridgeadvisors.com.

James Maurice Meyer, CFA®

Educational Background:

- BS, Wharton School of Finance of the University of Pennsylvania, 1968
- MBA, New York University, 1973

Business Experience:

- Chairman of the Board, Senior Portfolio Manager, Tower Bridge Advisors, Inc., 2026 - date
- Chief Executive Officer, Chairman of the Board, Tower Bridge Advisors, Inc., 2023 - 2025
- Co-Chief Investment Officer, Tower Bridge Advisors, Inc., 2020 – 2023
- Principal, Director, Tower Bridge Advisors, Inc., 2001 – date
- Chief Compliance Officer, Tower Bridge Advisors, Inc., 2001 – 2021
- Chief Investment Officer, Tower Bridge Advisors, Inc., 2001 - 2020
- Director of Research, Janney Montgomery Scott, 1973 - 2001

Year of Birth: 1946

Disciplinary Information: None

Other Business Activities: None

Additional Compensation: None

Supervision: James Maurice Meyer's advisory activities are supervised by Christopher Murray Crooks, Tower Bridge Advisors' Chief Investment Officer. Mr. Crooks reviews Mr. Meyer's work through internal reporting and Investment Committee meetings. You can contact Mr. Crooks by telephone, at 610.260.2200, or by e-mail at ccrooks@towerbridgeadvisors.com.

Daniel Patrick Rodan

Educational Background:

- BS Finance, Virginia Tech, 2003

Business Experience:

- Portfolio Manager, Tower Bridge Advisors, Inc., 2018 - date
- Portfolio Manager, Valley Forge Asset Management / Sterling Advisors, 2004 - 2018

Year of Birth: 1981

Disciplinary Information: None

Other Business Activities: None

Additional Compensation: None

Supervision: Daniel Patrick Rodan's advisory activities are supervised by Christopher Murray Crooks, Tower Bridge Advisors' Chief Investment Officer. Mr. Crooks reviews Mr. Rodan's work through internal reporting and Investment Committee meetings. You can contact Mr. Crooks by telephone, at 610.260.2200, or by e-mail at ccrooks@towerbridgeadvisors.com.

Industry Designations

The Chartered Financial Analyst® Designation

The Chartered Financial Analyst® (CFA®) designation is a qualification for finance and investment professionals, particularly in the fields of investment management and financial analysis of stocks, bonds and their derivative assets. The program focuses on portfolio management and financial analysis, and provides a general knowledge of other areas of finance.

The designation is an international professional certification offered by the CFA Institute to financial analysts who complete a series of examinations. To become a CFA® charter holder, candidates must pass each of three, six-hour exams; possess a bachelor's degree from an accredited institution; and have 48 months of qualified professional work experience. CFA® charter holders are also obligated to adhere to a strict Code of Ethics and Standards governing their professional conduct. [<https://www.cfainstitute.org>]

The Certified Financial Planner Designation

The Certified Financial Planner (CFP®) designation is granted by Certified Financial Planner Board of Standards, Inc. and entails the following requirements:

- Education – (1) A bachelor's degree or higher from an accredited college or university and (2) completion of coursework on financial planning through a CFP Board Registered Program. Most of the coursework requirement may be waived for an applicant that holds another specified degree, license or credential, including, but not limited to, a CFA®.
- Examination – Pass a one-day exam consisting of two 3-hour sessions that include stand-alone and scenario-based questions, as well as questions associated with case studies.
- Experience – Complete either 6,000 hours of professional experience related to the financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.
- Ethics – Commit to compliance with CFP Board's *Code of Ethics and Standards of Conduct*.
- Ongoing certification renewal and continuing education requirements.

Violation of the foregoing requirements may result in the suspension or revocation of a financial professional's CFP® certification. [<https://www.cfp.net>]