

Form ADV Part 2A: Firm Brochure

Item 1 – Cover Page

Tempus Wealth Partners, LLC

15 Dupont Circle 1204

Washington, D.C. 20036

202-870-8907

www.tempuswealthpartners.org

Date of Disclosure Brochure: December 2025

This disclosure brochure provides information about the qualifications and business practices of Tempus Wealth Partners (also referred to as I, me and Tempus Wealth Partners in this disclosure brochure). If you have questions regarding the terms of this disclosure brochure, please contact Corey D. Boller, CFA at 202-870-8907 or corey@tempuswealthpartners.org. The information in this disclosure brochure has not been approved or verified by the United States Securities and Exchange Commission or by any state securities authority.

Additional information about Tempus Wealth Partners is available on the Internet at www.adviserinfo.sec.gov. You can view my firm's information on this website by searching for Tempus Wealth Partners or my firm's CRD number 339567.

*Registration as an investment adviser does not imply a certain level of skill or training.

**Although Tempus Wealth Partners is referred to as I or me throughout this brochure for your convenience, please understand that any engagement described under this brochure will be made with the legal entity of Tempus Wealth Partners.

Item 2 – Material Changes

Tempus Wealth Partners is a newly registered investment adviser, and this disclosure brochure dated November 2025 is the first disclosure brochure prepared. In the future, this will discuss only specific material changes that are made to the disclosure brochure and provide readers with a summary of such changes. We will also reference the date of the last annual update of this disclosure brochure.

We will ensure that you receive a summary of any material changes to this and subsequent disclosure brochures within 120 days after my firm's fiscal year ends. My firm's fiscal year ends on September 30, so you will receive the summary of material changes no later than December 31 each year. At that time, I will also offer or provide a copy of the most current disclosure brochure. I may also provide other ongoing disclosure information about material changes, as necessary.

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Item 4 – Advisory Business

Tempus Wealth Partners is an investment adviser registered with the District of Columbia and is a limited liability company (LLC) formed under the laws of the District of Columbia.

- Corey D. Boller, CFA is the Founder of Tempus Wealth Partners. Corey D. Boller, CFA owns 100.00% of Tempus Wealth Partners. A proper biography of my education and business are provided at *Item 19* of this Disclosure Brochure.
- Tempus Wealth Partners filed its initial application to become registered as an investment adviser in November 2025.

Introduction

The investment advisory services of Tempus Wealth Partners are provided to you through an appropriately registered individual who is an investment adviser representative of Tempus Wealth Partners (referred to as your investment adviser representative throughout this brochure).

Family Office, Institutional, and Advisory Services

Tempus Wealth Partners provides confidential investment counsel. The Firm's white glove services include asset management and family office counsel in addition to providing financial planning and consulting as needed.

Tempus Wealth Partners operates under a fee-only service model. In operating as a fee-only Registered Investment Adviser, we are compensated solely by our clients through transparent advisory fees and do not receive commissions, referral fees, or other forms of third-party compensation. As a result, we do not sell financial products and have no financial incentive to recommend particular investments or strategies. This structure allows us to act as a fiduciary at all times, placing our clients' interests ahead of our own and reducing potential conflicts of interest commonly associated with fee-based or commission-based advisory models, including those used by traditional brokerage or wirehouse firms. Our advice is therefore provided on an objective, independent basis, with compensation aligned directly with the services we deliver to our clients on an ongoing basis.

Tempus Wealth Partners does not participate in wrap fee schedules at the time of writing. The Firm reserves the discretion to amend with wrap fee inclusive language, only if it is determined to be in the clients' best interests.

Please understand that a written agreement, which details the terms of the service, must be signed by you and Tempus Wealth Partners before the Firm can provide you with services.

Asset Management Services – Tempus Wealth Partners offers asset management services, which involves Tempus Wealth Partners providing continuous and ongoing supervision over your specified assets.

You must appoint the Firm as your investment adviser of record on specified accounts (collectively, the "Account"). The Account consists only of a separate account(s) held by a qualified custodian(s) under your name. The qualified custodians maintain physical custody of all funds and securities of the Account, and you retain all rights of ownership (e.g., right to withdraw securities or cash, exercise or delegate proxy voting and receive transaction confirmations) of the Account.

The Account is managed by Tempus Wealth Partners based on your needs, investment objectives and risk tolerance. Tempus Wealth Partners will actively monitor the Account and provide advice regarding buying, selling, reinvesting or holding securities, cash or other investments of the Account.

The Firm will need to obtain information from you to determine financial acumen, allowing for proper alignment of investment objectives. You will be responsible for notifying the Firm of any material changes regarding your financial situation, risk tolerance or investment objective and of any need to impose or modify investment restrictions. Tempus Wealth Partners will contact you at least annually to review and discuss material changes which have an impact on designated financial conditions, risk tolerance, or investment objectives. The Firm remains readily available to counsel you as needed through the year regarding the status of your wealth confidence. You may impose restrictions on the management of your account, including instruction not to purchase specific assets. As an instance, if a priority of cruelty-free animal companies is present, the Firm will abide by this rule.

Tempus Wealth Partners provides investment counsel that is tailored to the unique goals, circumstances, and objectives of each client. As a result, investment counsel provided and actions taken for your account may differ from those provided to other clients or from assets purchased in Firm management's personal accounts. We are not obligated to recommend or implement any investment for your account solely because it has been recommended, purchased, or sold for another client or for our own accounts, as all advice is provided in white-glove fashion.

Conflicts may arise in the allocation of investment opportunities among accounts under Tempus Wealth Partners' counsel. The Firm strives to allocate investment opportunities believed to be appropriate for your account(s) and other accounts advised by Tempus Wealth Partners' equitably and consistent with the best interests of all parties involved. There is no assurance that a commitment will be allocated in any particular manner. If Tempus Wealth Partners' obtains material, non-public information about a security or company that may not be lawfully used or disclosed, the Firm is unable to disclose the information or use this information for benefit.

Asset management methodologies, investment strategies, processes, and related materials produced by Tempus Wealth Partners are proprietary to the Firm and may be protected by trademark and other applicable intellectual property laws. These proprietary methodologies are developed and maintained exclusively by Tempus Wealth Partners and may not be disclosed, reproduced, or distributed beyond the advisory relationship without the Firm's prior written consent.

Financial Planning & Consulting Services - Tempus Wealth Partners offers comprehensive financial planning services that are tailored to address the complexity of individual, institutional, and family office clients. Financial planning services will include the preparation of a written financial plan addressing one or more areas relevant to the client's circumstances. These plans typically include, but are not limited to: asset allocation and investment strategy, cash flow and liquidity analysis, balance sheet and net worth management, tax-aware and tax-efficient planning strategies, estate and wealth transfer planning, trust

and entity coordination, philanthropic and charitable planning, education funding strategies, retirement and succession planning, risk management and insurance analysis, and ongoing portfolio review and oversight.

When providing financial planning and consulting services, Tempus Wealth Partners' role is to find ways to help you understand your overall financial situation and help you marry financial objectives with life goals.

The Firm offers consultations in order to discuss financial planning issues when you do not need a written financial plan. The Firm will offer a one-time consultation, which covers mutually agreed upon areas of concern related to investments or financial planning. We also offer "as-needed" consultations, which are limited to consultations in response to a particular investment or financial planning request. Under an "as-needed" consultation, the Firm will strive to identify the particular intellectual capital for which you are seeking advice or consultation on.

Wealth planning and consulting services do not involve the active and ongoing monitoring or management of your investments or accounts. You have the sole responsibility for determining whether to implement the Firm's financial planning and consulting recommendations.

To the extent that you wish to implement investment counsel through Tempus Wealth Partners or retain Tempus Wealth Partners to actively monitor and manage your assets, a written agreement with Tempus Wealth Partners must be properly executed.

An important disclosure regarding Retirement Plan Rollover Recommendations - When Tempus Wealth Partners provides investment advice about your retirement plan account or individual retirement account ("IRA") including whether to maintain investments and/or proceeds in the retirement plan account, roll over such investment/proceeds from the retirement plan account to an IRA or make a distribution from the retirement plan account, I acknowledge that Tempus Wealth Partners is a "fiduciary" within the meaning of Title I of the Employee Retirement Income Security Act ("ERISA") and/or the Internal Revenue Code ("IRC") as applicable, which are laws governing retirement accounts. Tempus Wealth Partners attempts to mitigate conflicts with your interests and operates under a special rule that requires the Firm to act in your best interest and not put Firm interest ahead of the client.

Under this special rule's provisions, Tempus Wealth Partners must as a fiduciary to a retirement plan account or IRA under ERISA/IRC:

- Meet a professional standard of care when making investment recommendations (give prudent advice);
- Never put the financial interests of Tempus Wealth Partners ahead of you when making recommendations (give loyal advice);
- Avoid misleading statements about conflicts of interest, fees, and investments;
- Follow policies and procedures designed to ensure that Tempus Wealth Partners gives advice that is in your best interest;
- Charge no more than is reasonable for the services of Tempus Wealth Partners; and
- Give clients basic information about conflicts of interest.

To the degree the Firm recommends you roll over your account from a current retirement plan account to an individual retirement account managed by Tempus Wealth Partners, please know that Tempus Wealth Partners may have a conflict of interest.

Tempus Wealth Partners has the potential to earn increased investment advisory fees by recommending that you roll over your account at the retirement plan to an IRA managed by Tempus Wealth Partners. The Firm will potentially earn less investment advisory fees if you do not roll over the funds in the retirement plan to an IRA managed by Tempus Wealth Partners.

Thus, our investment adviser representatives have an economic incentive to recommend a rollover of funds from a retirement plan to an IRA which is a conflict of interest because the Firm's recommendation that you open an IRA account to be managed by the Firm can be based on economic incentive and not based exclusively on whether or not moving the IRA to our management program is in your overall best interest.

The Firm has taken appropriate steps to mitigate this conflict of interest. The Firm has adopted an impartial conduct standard whereby our investment adviser representatives will (i) provide investment advice to a retirement plan participant regarding a rollover of funds from the retirement plan in accordance with the fiduciary status described below, (ii) not recommend investments which result in Tempus Wealth Partners receiving unreasonable compensation related to the rollover of funds from the retirement plan to an IRA, and (iii) fully disclose compensation received by Tempus Wealth Partners and our supervised persons and any material conflicts of interest related to recommending the rollover of funds from their retirement plan to an IRA and refrain from making any materially misleading statements regarding such rollover.

When providing counsel to a retirement plan account or IRA, the Firm will act with the care, skill, prudence, and diligence under the circumstances then prevailing that a prudent person acting in a like capacity and familiar with such matters would use, based on the investment objectives, risk, tolerance, financial circumstances, and a client's needs, without regard to the financial or other interests of Tempus Wealth Partners or our affiliated personnel.

Family Office Services

Tempus Wealth Partners offers Family Office Services designed to address the complex and multi-generational planning, coordination, and oversight needs of family office clients. These services are advisory and consultative in nature and are offered inclusively with the Firm's asset management services.

Family Office Services may include strategic advisory services such as tax planning coordination, long-term wealth accumulation strategies, estate and wealth transfer planning, and lifestyle, liquidity, and balance sheet planning. Tempus Wealth Partners may also provide investment oversight services, including portfolio strategy design, asset allocation and asset location analysis, manager selection and review, and coordination with custodians and third-party investment managers, as applicable.

Fiduciary-focused services may include family financial education, guidance related to closely held businesses, coordination with legal, tax, and fiduciary professionals, philanthropic planning, and advisory support related to generational and multi-generational planning. Governance and administrative services may include coordination of risk management strategies, regulatory and reporting support, cash management oversight, recordkeeping, and bill pay services, which may be provided by the Firm or facilitated through third-party service providers who have undergone proper diligence.

Family Office Services are tailored, based on each family's specific ongoing objectives, complexity, and preferences. The scope of services is established in advance and may be modified by mutual agreement. Tempus Wealth Partners will strive to maintain active communication regarding any material changes to your financial circumstances, goals, or constraints. Ultimately, the burden of providing this information on a timely basis will rest in the hands of the client once they are made aware. The Firm will review these matters with you at least annually while remaining reasonably available throughout the year to support the coordination and oversight of your family's wealth.

Advice provided as part of the Family Office Service offering is individualized and, if deemed appropriate, will be tailored relative to the advice provided to other clients or from strategies utilized in Firm management's personal accounts. Tempus Wealth Partners is not obligated to recommend or implement any strategy, investment, or course of action solely due to use for another client or for the Firm's own accounts.

Certain methodologies, processes, and materials utilized in connection with Tempus Wealth Partners' Family Office Services are proprietary to the Firm and may be protected by trademark and other applicable intellectual property laws. These proprietary elements are developed and maintained exclusively by Tempus Wealth Partners and may not be disclosed, reproduced, or distributed outside of the advisory relationship without the Firm's prior written consent.

Newsletters

Tempus Wealth Partners occasionally prepares general, educational and informational newsletters. Newsletters are always offered on an impersonal basis and do not focus on the needs of a specific individual.

Seminars/Workshops

Tempus Wealth Partners may occasionally provide seminars or workshops in areas such as financial planning, retirement planning, estate planning, family office best practices, and college planning. Seminars are always offered on an impersonal basis and do not focus on the individual needs of participants.

Investment Counsel

Tempus Wealth Partners will provide investment counsel on the following types of assets:

- Global Fixed Income Assets
- Cash
- U.S. Treasury Inflation-Protected Securities
- Investment Grade U.S. Nominal Bonds
- Custom Liability LDI Bond (or derivative-based) Portfolios (for Pension Plans)
- Foreign Bonds and Emerging Market Bonds
- Non-Investment Grade (High Yield) U.S. Nominal Bonds
- Unconstrained Bonds
- Global Equities
- U.S. Equities (large, mid & small cap)
- Foreign Developed Equities
- Emerging Market Equities

- Alternative Asset Classes
- Real Assets
- Real Estate (private and public)
- Natural Resources
- Commodity Futures
- Infrastructure
- Broadly Diversified Real Asset Strategies
- Other Niche Real Asset Opportunities
- Equity Hedge Strategies
- Hedge Funds
- Private Equity
- Venture Capital Funds
- Buyout Funds
- Lower Middle Market Companies
- Growth Equity Funds
- Distressed/Special Situation Funds
- Private Credit
- Other Niche Private Market Strategies
- Funds of Underlying Private Equity Funds
- Privately Held Assets
- Hard to Value Intangibles

Tempus Wealth Partners generally provides counsel on the assets listed, the Firm reserves the right to offer advice on any asset that may be suitable for each client's circumstances, needs, goals and objectives.

Tempus Wealth Partners may modify investment philosophy to accommodate special situations such as low basis stock, stock options, legacy holdings, inheritances, closely held businesses, intangible assets, collectibles, or special tax situations.

(Please refer to Item 8 – Methods of Analysis, Investment Strategies and Risk of Loss for more information.)

Tailored Advisory Services

Tempus Wealth Partners' advisory services are provided based on individual needs. The Firm will collaborate with you on a one-on-one basis through interviews and questionnaires to determine proper investment objectives and suitability.

Tempus Wealth Partners will not enter into an investment adviser relationship with a prospective client whose investment objectives may be considered incompatible with the Firm's investment philosophy, approach, or inclusive cultural beliefs.

Assets Managed by Tempus Wealth Partners

As a newly registered investment adviser, Tempus Wealth Partners, LLC. has no assets under management to report as of the date of this Brochure.

Item 5 – Fees and Compensation

In addition to the information provided in *Item 4 – Advisory Business*, this section provides details regarding the Firm’s services along with descriptions of each service’s fees and compensation arrangements. It is noted that lower fees for comparable service may be available from other sources. The precise fees and other terms will be detailed in the agreement between you and Tempus Wealth Partners, LLC.

Asset Management Services

Fees charged for the Firm’s asset management services are charged based on a percentage of assets under management, billed in advance (at the start of the billing period) on a monthly basis and calculated based on the fair market value of your account as of the last business day of the previous billing period. Fees are prorated (based on the number of days service is provided during the initial billing period) for your account opened at any time other than the beginning of the billing period. If asset management services are commenced in the middle of the billing period, then the prorated fee for that billing period is based on the value of the Account when services commence and is due immediately and will be deducted from Account when services commence.

The asset management services continue in effect until terminated by either party (i.e., Tempus Wealth Partners, LLC or you) by providing written notice of termination to the other party. Prepaid or unearned fees will be promptly refunded by Tempus Wealth Partners to you. Fee rebates will be determined on a pro rata basis using the number of days services are provided during the final period.

Fees charged for the Firm’s asset management services are discretionary and negotiable based on the type of client, the complexity of the client’s situation, the composition of the client’s account, (i.e., private limited partnerships, early stage opportunities, equities, fixed income securities, or fund structures) the holistic relationship of the client with the investment adviser representative, and the total amount of assets under management.

For the Firm’s asset management services, clients will be charged the following annual fee based upon the amount of assets under management:

<u>Assets Under Management</u>	<u>Annual Fees</u>
\$0 – \$500,000	1.250%
\$500,001 – \$1,000,000	1.000%
\$1,000,001 – \$2,000,000	0.750%
Over \$2,000,000	0.500%

The investment advisory fees will be deducted from your account and paid directly through the qualified custodian(s) of your account. See *Item 15 – Custody* for more details.

Tempus Wealth Partners encourages the review of your account statements received from the qualified custodian(s) in verification of the information within.

If custody and/or transaction fees are charged by the qualified custodian, these will be billed directly by the qualified custodian. Tempus Wealth Partners will not receive a portion of such commissions or fees from you or the qualified custodian.

Financial Planning & Consulting Services

Fees charged for the Firm's financial planning and consulting services are negotiable based upon the type of client, the services requested, the complexity of the client's situation, the composition of the client's account, other advisory services provided and the relationship of the client and the investment adviser representative. The following are the fee arrangements available for financial planning and consulting services offered by Tempus Wealth Partners.

Fees for Financial Planning and Consulting Services

Financial Planning and Consulting Services are provided to the Firm's asset management clients at no additional charge.

Project-Based Fees

For project-based arrangements and financial planning fees typically range from \$15,000 - \$150,000. Tempus Wealth Partners generally charges a client a fixed fee subject to an independent contract or as part of an amendment to an advisory agreement.

Hourly-Based Engagements

Tempus Wealth Partners may provide special project services under an hourly fee agreement. An hourly fee of \$500.00 per hour will be charged by Tempus Wealth Partners for hourly services. Before providing these services, Tempus Wealth Partners will provide an estimate of the approximate hours needed to complete the services. If Tempus Wealth Partners anticipates surpassing the estimated amount of hours required, Tempus Wealth Partners will notify in a timely fashion. The standard billing dates and events of Tempus Wealth Partners are the following: (1) the first business day of each month; (2) the date or thereafter that Tempus Wealth Partners provides the services; and (3) the date the engagement is agreed upon by the Client and Tempus Wealth Partners. Upon invoice to Client, Tempus Wealth Partners will deduct the hourly fees due Tempus Wealth Partners against Client's current retainer balance and Client will immediately pay Tempus Wealth Partners any balance of hourly fees due. Client agrees to notify Tempus Wealth Partners within ten (10) days of receipt of an invoice if Client disputes any billing entry.

The "as-needed" consulting services will terminate upon either you or Tempus Wealth Partners providing written notice of termination to the other party.

Consulting services may be terminated within five (5) business days of entering into an agreement with Tempus Wealth Partners without penalty or fees due. If you terminate the consulting services after five (5) business days of entering into an agreement with Tempus Wealth Partners, LLC, you will be responsible for payment of consulting work performed by Tempus Wealth Partners prior to the receipt by Tempus Wealth Partners of notice. For consulting services performed by Tempus Wealth Partners under an hourly arrangement, you will pay Tempus Wealth Partners for any hourly fees incurred at the rates described above. For consulting services performed by Tempus Wealth Partners under a fixed fee arrangement, you will pay an early termination fee for the hours worked by Tempus Wealth Partners multiplied by the hourly rate of \$500.00. In the event that there is a remaining balance of any fees paid in advance after the deduction of fees from the final invoice, those remaining proceeds will be refunded by Tempus Wealth Partners to you.

Other Fee Terms for Financial Planning & Consulting Services

To the degree Tempus Wealth Partners engages a third-party professional (e.g. attorney, independent investment adviser, valuation consultant, or accountant) while providing financial planning and consulting services to you, Tempus Wealth Partners will be responsible for the payment of the fees for the services of such a professional, and you will not be required to reimburse Tempus Wealth Partners for such payments. To the degree that you personally engage such a third-party professional, you will be responsible for the payment of the fees for the services of such a professional, and Tempus Wealth Partners will not be required to reimburse Client for such payments.

All fees paid to Tempus Wealth Partners for financial planning and consulting services are separate and distinct from the commissions charged by a custodian or asset management fee charged by an investment adviser to implement such recommendations.

Newsletters

Newsletters are provided to clients and prospective clients free of charge.

Seminars/Workshops

The Firm reserves discretion in charging fees for such engagements.

Item 6 – Performance-Based Fees and Side-By-Side Management

Performance-based fees are defined as fees based on a share of capital gains on or capital appreciation of the assets held in a client's account. *Item 6* is not applicable to this Disclosure Brochure because I do not charge or accept performance-based fees.

Item 7 – Types of Clients

Tempus Wealth Partners generally provides investment advice to the following types of clients:

- Individuals
- Family Offices
- High net worth individuals
- State or municipal government entities
- Trusts, estates, or charitable organizations
- Corporations or business entities other than those listed above

You are required to execute a written agreement with Tempus Wealth Partners specifying the particular advisory services in order to establish a client arrangement with Tempus Wealth Partners.

Minimum Investment Amounts Required

Tempus Wealth Partners reserves discretion as the Firm remains selective in client relationships. The Firm reserves discretion as to defined minimum investment amounts for establishing an account managed by Tempus Wealth Partners.

Each and every client will be required to execute an agreement for services in order to establish a client arrangement with Tempus Wealth Partners and/or parties involved.

Item 8 – Methods of Analysis, Investment Strategies and Risk of Loss

Methods of Analysis

The Firm employs a disciplined and flexible check-list approach in investment and economic analysis methodology, incorporating principles of financial economics and investment analysis recognized by the CFA Institute. The Firm's analysis integrates both quantitative and qualitative techniques to evaluate investment opportunities, assess risk, and construct portfolios consistent with client objectives and constraints.

Investment analysis may include fundamental analysis, such as the evaluation of financial statements, cash flow generation, profitability, capital structure, and competitive positioning, as well as macroeconomic analysis of economic growth, inflation, interest rates, fiscal and monetary policy, and global market conditions. Where appropriate, the Firm may also consider valuation techniques (e.g., discounted cash flow analysis, relative valuation metrics) and risk analysis, including volatility, correlation, and downside risk measures.

Portfolio construction and management emphasize diversification, risk-adjusted return considerations, and alignment with each client's investment objectives, time horizon, liquidity needs, and risk tolerance. The Firm may employ strategic or tactical asset allocation and may adjust portfolios in response to changes in market conditions, economic outlook, or client circumstances.

While the Firm applies established investment principles and analytical frameworks, no methodology can guarantee positive results. All investing involves risk, including the potential loss of principal.

Investment Strategies

Tempus Wealth Partners uses the following investment strategies when managing client assets and/or providing investment advice:

Long term purchases. Investments held at least a year.

Short term purchases. Investments sold within a year.

Quality Investing. The Firm has a preference for quality assets which attempt to acquire growth at reasonable valuations. (GARP) In applying the traditionally equity-focused terminology more broadly, these opportunities are considered relatively-attractive when allocated properly. The Firm maintains a long-only philosophy. The long-term nature is designed to identify and select investments to be held for multiple years. The Firm may invest in quality-oriented special situations with shorter anticipated holding periods.

Quality investing can be described as a strategy of selecting financially stable companies which are valued for less than their intrinsic or perceived values. Quality investors typically seek opportunities which they believe to be stable and that the market has undervalued relative to economic conditions, peers, or relative value. The risks associated with quality-investing include idiosyncratic factors, overestimating the value of a business and economic risks.

Cyclical Investment Counsel. Cyclical economic factors are considered, allowing the investor to allocate in a timely and favorable fashion.

Long-Term Investment Counsel. In allocating long-term assets, the Firm will periodically reset the portfolio to the base-line as investment performance skews the original allocations. The concept is comparable to a “buy and hold” methodology, actively adjusting with market conditions.

Diversification

Tempus Wealth Partners will not primarily recommend one type of security to clients. Instead, investment counsel will be personalized for each client relative to that client’s specific circumstances and needs.

Risk of Loss

Past performance is not indicative of future results. Therefore, you should never assume that future performance of any specific investment or investment strategy will be reflective of past performance. Investing carries risk, including the risk of loss and original principal. Tempus Wealth Partners, LLC is unable to guarantee profit.

Item 9 – Disciplinary Information

Item 9 is not applicable to this Disclosure Brochure because there are no legal or disciplinary events that are material to a client’s or prospective client’s evaluation of my business or integrity.

Item 10 – Other Financial Industry Activities and Affiliations

Tempus Wealth Partners is not and does not have a related person that is a broker/dealer, municipal securities dealer, government securities dealer or broker, an investment company or other pooled investment vehicle (including a mutual fund, closed-end investment company, unit investment trust, private investment company or “hedge fund,” and offshore fund), another investment adviser or financial planner, a futures commission merchant, commodity pool operator, or commodity trading advisor, a banking or thrift institution, an accountant or accounting Firm, a lawyer or law Firm, an insurance company or agency, a pension consultant, a real estate broker or dealer, and a sponsor or syndicator of limited partnerships.

I am an independent registered investment adviser and provide investment advisory services. I am not engaged in any other business activities and offer no other services except those described in this Disclosure Brochure.

Item 11 – Code of Ethics, Participation in Client Transactions and Personal Trading

Code of Ethics Summary

Tempus Wealth Partners, LLC honors the fiduciary commitment to each and every client. The Firm has an oath to abide by the more strict of 1) the CFA Institute or 2) the Code of Ethics to comply with the requirements of the securities laws and regulations that reflects its fiduciary obligations and those of its supervised persons. Tempus Wealth Partners requires affiliates and affiliated persons to comply with the Firm's fiduciary responsibilities. The standard of conduct required is higher than ordinarily encountered.

This section is intended to provide a summary description of the Code of Ethics of Tempus Wealth Partners. The complete Code of Ethics is readily available upon request.

Affiliate and Employee Personal Securities Transactions Disclosure

Tempus Wealth Partners and supervised persons of the Firm may invest their personal accounts in investments which are recommended to clients. This creates a conflict of interest. It is the policy of Tempus Wealth Partners to place client interests ahead of their own when implementing personal investments.

I am now and will continue to be in compliance with applicable state and federal rules and regulations. Tempus Wealth Partners, LLC has developed written supervisory procedures that include personal investment and trading policies for representatives, employees and their immediate family members (collectively, supervised persons):

- Supervised persons cannot prefer their own interests to that of the client.
- Supervised persons cannot purchase or sell any security for their personal accounts prior to implementing transactions for client accounts.
- Supervised persons cannot buy or sell securities for their personal accounts if deemed material and non-public.
- Supervised persons are prohibited from purchasing or selling securities of companies in which any client is deemed an "insider."
- Supervised persons serving as board members of publicly traded companies must obtain proper channel authorization, in this instance, the Chief Compliance Officer of Tempus Wealth Partners.

A supervised person not observing policies is subject to proper review, training, and authorization.

Item 12 – Market Access Best Practices

If Tempus Wealth Partners assists in the implementation of recommendations, the Firm is responsible to ensure that the client receives the best execution. In other words, all conditions considered, the execution is performed in the manner which is most favorable for the client. When considering best execution, the Firm will consider numerous factors such as:

- Execution capabilities (e.g., market expertise, ease/reliability/timeliness of execution and responsiveness)
- Technological efficacy (e.g., investment programs, back office services, technology, regulatory compliance assistance, research and analytic services)

- Reliability and accuracy

Tempus Wealth Partners, LLC practices thorough due diligence in achieving best execution.

Custodian Solutions

Tempus Wealth Partners may recommend/require that clients establish brokerage accounts with the Schwab Institutional division of Charles Schwab & Co., Inc (“Schwab”), a FINRA-registered broker-dealer, Member SIPC, to maintain custody of clients’ assets and to complete trades for their accounts. Although Tempus Wealth Partners may recommend or require the clients establish accounts at Schwab, it is the client’s decision to custody assets with Schwab. Tempus Wealth Partners is independently owned and operated and not affiliated with Schwab. Tempus Wealth Partners may recommend additional unaffiliated broker-dealers or custodial solutions to complete fixed income orders.

Schwab’s products and services that assist Tempus Wealth Partners in managing and administering clients’ accounts include software and other technology that (i) provides access to client account data (such as trade confirmations and account statements); (ii) facilitate trade execution and allocate aggregated trade orders for multiple client accounts; (iii) provide research, pricing and other market data; (iv) facilitate payment of Tempus Wealth Partners’s fees from some of its accounts; and (v) assist with back-office functions, recordkeeping and client reporting.

Schwab offers Tempus Wealth Partners services intended for the benefit of clients. These services may include: (i) compliance, legal and business consulting; (ii) publications and conferences on practice management and business succession; and (iii) access to employee benefits providers, human capital consultants and insurance providers. Schwab may discount or waive fees. Schwab may also provide benefits such as educational events or hosting of Tempus Wealth Partners personnel. While serving as a fiduciary, Tempus Wealth Partners endeavors to act in clients’ best interests, Tempus Wealth Partners’ recommendation that clients maintain their assets in accounts at Schwab may take into account availability of products, services, and other arrangements.

Soft Dollar Benefits

An investment adviser receives soft dollar benefits from a broker-dealer when the investment adviser receives research or other products and services in exchange for client securities transactions or maintaining an account balance with the broker-dealer.

Tempus Wealth Partners does not have a soft dollar agreement with a broker-dealer or a third-party.

Block Trading Policy

I may elect to purchase or sell the same securities for several clients at approximately the same time. This process is referred to as aggregating orders, batch trading or block trading and is used by the Firm when Tempus Wealth Partners believes such action may prove advantageous to clients. If and when I aggregate client orders, allocating securities among accounts is done on a fair and equitable basis. The process of aggregating client orders is done in order to achieve better execution, to negotiate more favorable terms or to allocate orders among clients on a more equitable basis in order to avoid differences in prices and transaction fees or other transaction costs that might be obtained when orders are placed independently.

Tempus Wealth Partners will aggregate average prices for allocation included in block orders, to be distributed across accounts.

If and when the Firm determines to aggregate orders for the purchase or sale of securities, the Firm will do so in accordance with the parameters set forth in the SEC No-Action Letter, *SMC Capital, Inc.* The Firm will not receive compensation as a result of block trades. If Tempus Wealth Partners includes proprietary accounts of the Firm or personal accounts of its supervised persons in an aggregated client order (i.e., block trade), Tempus Wealth Partners will take the following actions:

1. Aggregate transactions only if Tempus Wealth Partners believes that aggregation is consistent with its duty of best execution;
2. Allocate orders on a pro rata basis for partially filled orders;
3. Not favor any client over any other client, proprietary account of Tempus Wealth Partners (and its affiliates) or personal account of a supervised person of Tempus Wealth Partners, and each client/proprietary account/personal account participating in the order will participate at an average share price of all Tempus Wealth Partners's transactions in that security on the day of execution and transaction costs will be shared on a pro rata base for each client's participation in the transaction;
4. Prepare a written statement prior to entering into an aggregated order that will specify the participating clients and proprietary accounts/personal accounts and how Tempus Wealth Partners intends to allocate the order among clients;
5. Deviate from the written allocation statement only on a fair basis with written documentation approved by the Firm's chief compliance officer or designee no later than one hour after the opening of the markets on the trading day following the day the order executed;
6. Maintain accurate records relating to the aggregated trades, including, each client account/proprietary account/personal account that is included in an aggregated order, the securities held by and bought and sold for that client account/proprietary account/personal account;
7. Not aggregate client/proprietary/personal assets collectively any longer than necessary to settle the purchase or sale transaction;
8. Not receive any additional compensation or remuneration as a result of any aggregated order; and
9. Render individual advice and treatment to each advisory client.

Agency Cross Transactions

Tempus Wealth Partners does not engage in agency cross transactions, this means the Firm will not act as brokers for both the sale and purchase of a single security on behalf of two different clients and will not receive compensation in the form of an agency cross commission or principal mark-up for the trades.

Item 13 – Review of Accounts

Investment Counsel Review

Accounts under Tempus Wealth Partners investment counsel are reviewed at least quarterly. Investment counselling will be provided in effort to best serve the constituents involved, at the discretion and convenience of the individual client's timeline. The review will include a range of investment strategy and

objectives review and making a change if strategy and objectives have changed. Reviews are conducted by Corey Boller, with reviews performed in accordance with your investment goals and objectives.

The Firm's financial planning and consulting services do not include monitoring the investments of your account(s), and therefore, there is no ongoing review of your account(s) under such services.

Statements and Reports

For Tempus Wealth Partners' asset management services, you are provided with transaction confirmation notices and regular quarterly account statements in writing directly from the qualified custodian. Tempus Wealth Partners may provide position or performance reports to you quarterly and upon request.

Financial planning clients do not receive any report other than the written plan originally established with the Firm. Tempus Wealth Partners encourages the review of account statements delivered from the qualified custodian. If questions arise regarding the account statement, please do not hesitate to contact Tempus Wealth Partners.

Item 14 – Client Referrals and Other Compensation

Tempus Wealth Partners does not directly or indirectly compensate any person for client referrals.

The only compensation received from advisory services are the fees charged for providing investment advisory services as described in *Item 5* of this Disclosure Brochure. Tempus Wealth Partners receives no other forms of compensation in connection with providing investment advice.

Tempus Wealth Partners receives an economic benefit from Schwab in the form of the support products and services it makes available to those whose clients maintain their accounts at Schwab. These products and services, how they benefit the Firm and clients, and the related conflicts of interest are described above (see *Item 12 – Brokerage Practices*). The availability of Schwab's products and services is not based on providing specific investment advice, such as buying particular assets for my clients.

Please see Item 5, Fees and Compensation, Item 10, Other Financial Industry Activities and Affiliations and Item 12, Brokerage Practices, for additional discussion concerning other compensation.

Item 15 – Custody

Custody, as it applies to investment advisors, has been defined by regulators as having access or control over client funds and/or assets. In other words, custody is not limited to physically holding client funds and securities. If an investment adviser has the ability to access or control client funds or securities, the investment adviser is deemed to have custody and must ensure proper procedures are implemented.

Tempus Wealth Partners is deemed to have custody of client funds and securities whenever Tempus Wealth Partners is given the authority to have fees deducted directly from client accounts. However, this is the only form of custody Tempus Wealth Partners will ever maintain. It should be noted that authorization to trade in client accounts is not deemed by regulators to be custody.

For accounts in which Tempus Wealth Partners is deemed to have custody, the Firm has established procedures to ensure all client funds and assets are held at a qualified custodian in a separate account

for each client under the client's name. The client or an independent representative will direct, in writing, the establishment of all accounts and therefore are aware of the qualified custodian's name, address and the manner in which the funds or securities are maintained. Finally, account statements are delivered directly from the qualified custodian to each client, or the client's independent representative, at least quarterly. Tempus Wealth Partners recommends the careful review of those statements. If clients have inquiry with account statements, please do not hesitate to contact Tempus Wealth Partners or the qualified custodian preparing the statement.

Item 16 – Investment Discretion

In providing asset management services, Tempus Wealth Partners maintains trading authorization over the account and provides management on a discretionary basis. When discretionary authority is granted, the Firm has the authority to determine the type and amount of assets that can be purchased or sold.

The ability to place reasonable restrictions on the types of investments that may be purchased in the account is one of client discretion. Comparably, reasonable limitations on the discretionary power granted to Tempus Wealth Partners is permitted so long as the limitations are specifically set forth or enclosed within the client agreement.

Item 17 – Voting Client Securities

Proxy Voting

Tempus Wealth Partners does not participate in proxy-voting decisions at the time of writing.

Item 18 – Financial Information

This *Item 18* is not applicable to this brochure. Tempus Wealth Partners does not require or solicit prepayment of more than \$500 in fees per client, six months or more in advance. Therefore, I am not required to include a balance sheet for the most recent fiscal year. I am not subject to a financial condition that is reasonably likely to impair my ability to meet contractual commitments to clients. Finally, Tempus Wealth Partners has not been the subject of a bankruptcy petition at any time.

Item 19 – Requirements for State-Registered Advisers

Executive Officer and Management Personnel

Corey D. Boller, CFA

Educational Background:

Eastern Michigan University, Bachelors of Business Administration in Accounting: 2015

Business Experience:

Tempus Wealth Partners, Managing Member, 10/2025 to Present;

C&N, Investment Officer, 05/2024 to 11/2024

Bank of Ann Arbor, Portfolio Manager and Business Development Officer, 06/2023 to 12/2023

Rehmann, Manager, Capital Management Group, 11/2015 to 02/2023

Other Business Activities

See *Item 10 – Other Financial Industry Activities and Affiliations*.

No Performance Based Fees

As previously disclosed in *Item 6*, Tempus Wealth Partners does not charge or accept performance-based fees.

No Arbitrations

Tempus Wealth Partners or any of its associated persons have not been the subject of any client arbitrations or similar legal disputes.

No Arrangement with Issuer of Securities

Tempus Wealth Partners and its management do not have any relationship or arrangement with any issuer of securities.

Customer Privacy Policy Notice

Commitment to Your Private Information: Tempus Wealth Partners has developed a policy of protecting the confidentiality and security information we collect about our clients. We do not, and will not, share nonpublic personal information about you (“Information”) with outside third parties without your consent, except for the specific purposes described below. This notice has been provided to you to describe the Information we gather and the situations under which we need to share it.

Why We Collect and How We Use Information. We limit the collection and use of Information within our Firm to only those individuals associated or employed with us that must have Information to provide financial services to you. Such services include maintaining your accounts, processing transaction requests, providing financial planning, financial advisory, and other services described in our Form ADV.

Types of Information We Collect and How We Gather Information. Client Information collected by our Firm includes, but is not limited to the following:

- Information received from clients on financial inventories through consultations with our representatives. This information can include personal and household information such as income, spending habits, investment objectives, financial goals, statements of account and other records concerning the clients’ financial conditions and assets, together with information concerning employee benefits and retirement plan interests, wills, trusts, mortgages and tax returns.
- Information developed as part of financial plans, analyses or investment advisory services.
- Information concerning investment advisory account transactions and trades.
- Information about clients’ financial products and services transactions with our Firm.
- Additional examples are listed below.

We get most Information directly from you when you provide us with information from any of the following sources:

- Applications or forms (for example: name, physical address(es), email address(es), phone number(s), social security number, birth date, assets, income, financial history)
- Transactional activity in your account (for example: trading history and account balances)
- Information services and consumer reporting sources (for example: to verify your identity or to assess your credit history)
- Other sources with your consent (for example: your insurance professional, attorney, or accountant)

How We Protect Information. Our employees and affiliated persons are required to protect the confidentiality of Information and to comply with our stated policies. They may access Information only when there is an acceptable reason to do so, such as to service your account or provide you with financial services. Employees who violate our Privacy Policy are subject to disciplinary action, up to and including termination from employment with us. We also maintain physical, electronic, and procedural safeguards to protect information, which comply with applicable SEC, state, and federal laws.

Sharing Information with Other Companies Permitted Under Law. Information and advice furnished by Tempus Wealth Partners to you, is treated as confidential and not disclosed to affiliated or unaffiliated third parties, except as (1) permitted by you with written authorization, (2) shared in a manner necessary to facilitate the advisory services provided by Tempus Wealth Partners or (3) as required by any rule, regulation or law of any regulatory organization to which Tempus Wealth Partners or our investment advisor representatives may be subject.

For example: you may ask Tempus Wealth Partners to provide information to your other services providers, such as your accountant, and we are pleased to be of assistance when you direct us to share information. Regulatory and self-regulatory bodies generally conduct routine audits of investment advisers to review books and records, and in the process may review client information. Additionally, your account custodians and their personnel will have access to and review client data for their internal purposes.

Former Customers. Even if we cease to provide you with financial products or services, our Privacy Policy will continue to apply to you, and we will continue to treat your nonpublic information with strict confidentiality.

Delivery Methods. A copy of this CUSTOMER PRIVACY POLICY NOTICE will be delivered to all clients in writing by at least one of the following methods:

- By hand delivering a copy to the client
- Mailing a copy to the client's address on record
- If business is conducted electronically, a notice may be posted on an electronic site as long as the client acknowledges receipt of the notice prior to the client obtaining any services or products from Tempus Wealth Partners

A copy of the Privacy Policy Notice will be provided to the client no later than the time a client establishes a relationship with Tempus Wealth Partners, unless this situation would cause a delay in the client obtaining services and the client agrees to accept the notice at a later date. When this situation applies, a

copy of the Privacy Policy Statement will be delivered to the client within a reasonable time period following the transaction.

Any time a change is made to the Privacy Policy, the statement to clients will be revised. The revised statement will be given to all affected clients prior to any disclosure of information.

Business Continuity Plan

Tempus Wealth Partners has a business continuity and contingency plan in place designed to respond to significant business disruptions. These disruptions can be both internal and external. Internal disruptions will impact my ability to communicate and do business, such as a fire in the office building. External disruptions will prevent the operation of the securities markets or the operations of a number of firms, such as earthquakes, wildfires, hurricanes, terrorist attacks or other wide-scale, regional disruptions.

My continuity and contingency plan has been developed to safeguard employees' lives and Firm property, to allow a method of making financial and operational assessments, to quickly recover and resume business operations, to protect books and records, and to allow clients to continue transacting business.

The plan includes the following:

- Alternate locations to conduct business;
- Hard and electronic back-ups of records;
- Alternative means of communications with employees, clients, critical business constituents and regulators; and
- Details on the Firm's employee succession plan

My business continuity and contingency plan is reviewed and updated on a regular basis to ensure that the policies in place are sufficient and operational.

Form ADV Part 2B: Brochure Supplement

Item 1 – Cover Page

Corey D. Boller, CFA
Tempus Wealth Partners
15 Dupont Circle, Number 1204
Washington, D.C 20036
202-870-8907
www.tempuswealthpartners.org

Date of Supplement: December 2025

This brochure supplement provides information about Corey D. Boller that supplements the Tempus Wealth Partners (“Tempus Wealth Partners”) disclosure brochure. Please contact Corey D. Boller at 202-870-8907 or at corey@tempuswealthpartners.org if you did not receive Tempus Wealth Partners’ brochure or if you have any questions about the contents of this supplement.

Additional information about Corey D. Boller is available on the SEC’s website at www.adviserinfo.sec.gov.

Item 2 – Educational Background and Business Experience

Corey D. Boller, CFA

CRD # 6624311

Post Secondary Educational Background:

Educational Background:

Eastern Michigan University, Bachelors of Business Administration: 2015

Business Background:

Tempus Wealth Partners, Managing Member, 10/2025 to Present;
C&N, Investment Officer, 05/2024 to 11/2024
Bank of Ann Arbor, Portfolio Manager and Business Development Officer, 06/2023 to 12/2023
Rehmann, Manager, Capital Management Group, 11/2015 to 02/2023

Professional Designations

Chartered Financial Analyst (CFA)

The Chartered Financial Analyst (CFA) designation is issued by the CFA Institute. The CFA Program is considered the highest distinction program in the investment management industry for investment specialists such as securities analysts, money managers, and investment advisers. To earn the right to use the CFA designation, an individual must have at least four years of acceptable professional experience in the investment decision-making process, must pass three sequential, six-hour

examinations. Each of the 3 course level exams must be passed and each course level is a self-study program involving approximately 250 hours of study time. There are no continuing education requirements to maintain the CFA designation. CFA charterholders must commit to abide by and annually reaffirm adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct.

The CFA Institute is the premier global association for investment professionals, dedicated to leading the investment profession worldwide by promoting the highest standards of ethics, education, and professional excellence. As the awarding body for the prestigious Chartered Financial Analyst (CFA) designation, the Institute serves as a definitive benchmark for technical competence and integrity within the global financial markets. By fostering a community of ethically driven practitioners and providing cutting-edge research through its vast network of societies, the CFA Institute plays a critical role in building a sustainable investment industry.

- Global Authority: Establishes the Institute as the industry leader.
- The Three Pillars: Highlights Ethics, Education, and Excellence.
- The Designation: Explicitly mentions the CFA Charter as the gold standard.
- Societal Impact: Touches on the Institute's mission to benefit the broader public interest.

CFA Institute

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 comprehensive knowledge for investment decision making and is firmly grounded in the knowledge and skills used every day in the investment profession. The CFA Program demonstrates 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.

Item 3 – Disciplinary Information

Corey D. Boller, CFA has no legal or disciplinary events to report.

Item 4 – Other Business Activities

Corey D. Boller, CFA has no other business activities to report.

Item 5 – Additional Compensation

Corey D. Boller, CFA has no compensation to report.

Item 6 – Supervision

Corey D. Boller, CFA is the Chief Compliance Officer of Tempus Wealth Partners. He is responsible for overseeing and enforcing the Firm's compliance programs that have been established to monitor and supervise the activities and services provided by the Firm and its representatives. Corey D. Boller can be contacted at 202-870-8907.

Item 7 – Requirements for State-Registered Advisers

Corey D. Boller, CFA has not been involved in an arbitration award and has not been found liable in an arbitration claim alleging damages in excess of \$2,500. He has not been involved in any award or found liable in any civil, self-regulatory organization, or administrative proceeding. Additionally, he has not been the subject of a bankruptcy petition.