

**Item 1: Cover Page
Part 2B of Form ADV: Brochure Supplement
March 2021**



Angela Park Sheldon

**Tortuga Wealth Management
1957 Carson St. Suite 100
Torrance, CA 90501
www.tortugawealth.com**

**Firm Contact:
Angela Park Sheldon
Chief Compliance Officer**

This brochure supplement provides information about Ms. Park-Sheldon that supplements our brochure. You should have received a copy of that brochure. Please contact Ms. Park-Sheldon-Sheldon if you did not receive Tortuga Wealth Management's brochure or if you have any questions about the contents of this supplement. Additional information about Ms. Park-Sheldon is available on the SEC's website at www.adviserinfo.sec.gov by searching CRD # 2905596.

Item 2: Educational Background & Business Experience

Angela Park Sheldon

Year of Birth: 1976

Educational Background:

- 1998: University of California, Los Angeles; Bachelor of Arts in History

Business Background:

- 2010– Present Tortuga Wealth Management; VP, Managing Partner & CCO
- 2010 – Present LPL Financial; Registered Representative
- 2009 – 2010 Morgan Stanley Smith Barney; Financial Advisor & Financial Planning Specialist
- 2005– 2009 Citigroup Global Markets Inc.; Financial Advisor & Financial Planning Specialist
- 2001 – 2005 Morgan Stanley D.W., Inc.; Financial Advisor

Exams, Licenses & Other Professional Designations:

- 2006: CERTIFIED FINANCIAL PLANNER™, CFP®
- 2002: CA Insurance Licensed
- 2002: Series 31 & 66 Exams
- 2001: Series 7 Exam

CERTIFIED FINANCIAL PLANNER™, CFP®

The CFP® certification is obtained by completing an advanced college-level course of study addressing the financial planning subject areas that the CFP® Board's studies have determined as necessary for the competent and professional delivery of financial planning services, a comprehensive certification exam and agreeing to be bound by the CFP® board's Standard of Professional Conduct. As a prerequisite, the individual must have a Bachelor's degree from a regionally accredited United States college or university (or foreign university equivalent) and have at least 3 years of full time financial planning experience (or equivalent measured at 2,000 hours per year). This designation requires 30 hours of continuing education every 2 years and renewing an agreement to be bound by the *Standards of Professional Conduct*.

Item 3: Disciplinary Information¹

There are no legal or disciplinary events material to the evaluation of Ms. Park-Sheldon.

Item 4: Other Business Activities

Ms. Park-Sheldon is a registered representative of LPL Financial, member FINRA/SIPC, and licensed insurance agent/broker. She may offer products and receive normal and customary commissions as a result of these transactions. A conflict of interest may arise as these commissionable securities sales may create an incentive to recommend products based on the compensation earned. To mitigate this potential conflict, Ms. Park-Sheldon, as a fiduciary, will act in the client's best interest.

¹ Note: Our firm may, under certain circumstances, rebut the presumption that a disciplinary event is material. If an event is immaterial, we are not required to disclose it. When we review a legal or disciplinary event involving the advisor to determine whether it is appropriate to rebut the presumption of materiality, we consider all of the following factors: (1) the proximity of advisor to the advisory function; (2) the nature of the infraction that led to the disciplinary event; (3) the severity of the disciplinary sanction; and (4) the time elapsed since the date of the disciplinary event. If we conclude that the materiality presumption has been overcome, we prepare and maintain a file memorandum of our determination in our records. We follow SEC rule 204-2(a)(14)(iii) and similar state rules.

Item 5: Additional Compensation

Ms. Park-Sheldon does not receive any other economic benefit for providing advisory services in addition to advisory fees.

Item 6: Supervision

Kevin Bidenkap, President of Tortuga Wealth Management, supervises and monitors Ms. Park-Sheldon's activities on a regular basis to ensure compliance with our firm's Code of Ethics. Please contact Mr. Bidenkap if you have any questions about Ms. Park-Sheldon's brochure supplement at 310-906-0517.

Item 7: Requirements for State-Registered Advisers

Ms. Park-Sheldon has not been involved in any arbitration claim alleging damages in excess of \$2,500. Furthermore, she has neither been involved in nor found liable in any civil, self-regulatory organization, or administrative proceeding nor has been the subject of any bankruptcy petitions.