Item 1 – Cover Page

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Brochure Supplement - Fredric W. Williams

March 2022

This brochure supplement provides information about Fredric W. Williams that supplements Old Port Advisors' brochure. You should have received a copy of that brochure. Please contact us at 207-774-6552 if you did not receive OPA's brochure or if you have any questions about the contents of this supplement.

Additional information about Fredric W. Williams is available on the SEC's website at www.adviserinfo.sec.gov.

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Item 2 - Educational Background and Business Experience

Fredric W. Williams was born in 1956.

Education

B.S. Degree Vassar College – Psychology, Political Science

Graduate courses for M.B.A. Program – University of Southern Maine, Portland

Business History

(10/2014–Present)	Old Port Advisors - Principal
(05/1994-10/2014)	Investment Management & Consulting Group - Principal
(12/1987-01/1994)	Prudential Securities – 1st Vice President
(09/1979-11/1987)	E.F. Hutton & Co. - Vice President

Item 3 - Disciplinary Information

Fredric W. Williams does not have any disciplinary history to disclose.

Item 4 - Other Business Activities

Mr. Williams no other business activities to report.

Item 5 - Additional Compensation

There is no additional compensation awarded to Mr. Williams for providing advisory services.

Item 6 - Supervision

In the course of her supervisory duties as CCO, Erica Bly and compliance personnel under her supervision will periodically review advisory accounts, correspondence, and advisory activities of Mr. Williams. Please contact Erica Bly at (207) 774-6552 with questions regarding supervision.

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Brochure Supplement – Tracy W. Rogers

March 2022

This brochure supplement provides information about Tracy Rogers that supplements Old Port Advisors' brochure. You should have received a copy of that brochure. Please contact us at 207-774-6552 if you did not receive OPA's brochure or if you have any questions about the contents of this supplement.

Additional information about Tracy W. Rogers is available on the SEC's website at www.adviserinfo.sec.gov.

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Item 2 - Educational Background and Business Experience

Tracy Rogers was born in 1967.

Education

Undergraduate coursework for Business Administration, Colorado State University

Business History

(03/2019–Present)	Old Port Advisors – Vice President and Portfolio Manager
(10/2014-03/2019)	Old Port Advisors – Vice President, Portfolio Manager, Chief Compliance Officer
(01/2006-10/2014)	Investment Management & Consulting Group – Vice President, Portfolio Manager
(07/2002-01/2006)	Investment Management & Consulting Group – Director of Operations
(01/2000-06/2002)	American Express Financial Advisors – Financial Advisor

Item 3 - Disciplinary Information

Tracy Rogers does not have any disciplinary history to disclose.

Item 4 - Other Business Activities

Tracy Rogers serves on the Board of Big Brothers Big Sisters of Southern Maine. There is no compensation for this outside activity.

Item 5 - Additional Compensation

Mr. Rogers is entitled to receive compensation from Old Port Advisors, in addition to salary, for generating new accounts.

Item 6 - Supervision

In the course of her supervisory duties as CCO, Erica Bly and compliance personnel under her supervision will periodically review advisory accounts, correspondence, and advisory activities. The advice that Mr. Rogers provides to clients is subject to periodic review by Erica Bly, Chief Compliance Officer. Please contact Erica Bly at (207) 774-6552 with questions regarding supervision.

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Brochure Supplement - Francis J. Davies, III

March 2022

This brochure supplement provides information about Francis J. Davies, III that supplements Old Port Advisors' brochure. You should have received a copy of that brochure. Please contact us at 207-774-6552 if you did not receive OPA's brochure or if you have any questions about the contents of this supplement.

Additional information about Francis J. Davies, III is available on the SEC's website at www.adviserinfo.sec.gov.

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Item 2 - Educational Background and Business Experience

Francis J. Davies, III was born in 1959.

Education

B.A. Degree Lafayette College – Political Science

Business History

(10/2014–Present)	Old Port Advisors - Vice President and Portfolio Manager
(01/2006-10/2014)	Investment Management & Consulting Group - Vice President and Portfolio Manager
(03/2002-12/2005)	Westport Capital Markets – Managing Director
(01/1996-03/2002)	Avalon Financial Counsel – President
(05/1988-01/1996)	Reynders, Gray & Gottlieb – Vice President
(06/1983-05/1988)	Laidlaw Asset Management – Vice President

Item 3 - Disciplinary Information

Francis Davies does not have any disciplinary history to disclose.

Item 4 - Other Business Activities

Francis Davies is on the Board of Directors as a Member at large for Preble Street.

Item 5 - Additional Compensation

There is no additional compensation awarded to Mr. Davies for providing advisory services.

Item 6 - Supervision

In the course of her supervisory duties as CCO, Erica Bly and compliance personnel under her supervision will periodically review advisory accounts, correspondence, and advisory activities of Mr. Davies. Please contact Erica Bly at (207) 774-6552 with questions regarding supervision.

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Brochure Supplement - Jason E. Foster

March 2022

This brochure supplement provides information about Jason E. Foster that supplements Old Port Advisors' brochure. You should have received a copy of that brochure. Please contact us at 207-774-6552 if you did not receive OPA's brochure or if you have any questions about the contents of this supplement.

Additional information about Jason E. Foster is available on the SEC's website at www.adviserinfo.sec.gov.

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Item 2 - Educational Background and Business Experience

Jason E. Foster was born in 1972.

Education

B.A. Degree University of Maine, Farmington – Economics

Business History

(10/2014–Present)	Old Port Advisors - Vice President and Portfolio Manager
(05/2012 – 07/2020)	Purshe Kaplan Sterling Investments, Inc. – Registered Representative
(05/2012-10/2014)	Investment Management & Consulting Group - Vice President and Portfolio Manager
(06/2009-05/2012)	Morgan Stanley Smith Barney – Financial Advisor
(02/2006-06/2009)	Citigroup Global Markets – Financial Advisor
(05/1998-02/2006)	Legg Mason Wood Walker – Financial Advisor

Item 3 - Disciplinary Information

Jason Foster does not have any disciplinary history to disclose.

Item 4 - Other Business Activities

Jason Foster is also a licensed life and health insurance agent. In this capacity he can affect transactions in insurance products for clients and earn commissions for these activities. We expect that clients to whom we offer advisory services may also be clients who purchase insurance products through Mr. Foster. Insurance commissions earned in these transactions are separate and distinct from our advisory fees. This creates a conflict of interest because of the receipt of additional compensation by Mr. Foster. Our clients are under no obligation to use Mr. Foster for insurance services and may use the insurance firm and agent of their choosing.

Item 5 - Additional Compensation

Jason Foster does not receive an economic benefit for providing advisory services from any non-client.

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Item 6 - Supervision

In the course of her supervisory duties as CCO, Erica Bly and compliance personnel under her supervision will periodically review advisory accounts, correspondence, and advisory activities of Mr. Foster. Please contact Erica Bly at (207) 774-6552 with questions regarding supervision.

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Brochure Supplement - Ben W. Daigle

March 2022

This brochure supplement provides information about Ben W. Daigle that supplements Old Port Advisors' brochure. You should have received a copy of that brochure. Please contact us at 207-774-6552 if you did not receive OPA's brochure or if you have any questions about the contents of this supplement.

Additional information about Ben W. Daigle is available on the SEC's website at www.adviserinfo.sec.gov.

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Item 2 - Educational Background and Business Experience

Ben W. Daigle was born in 1981.

Education

B.S. Degree University of Southern Maine, Portland - Business Administration, concentration in Finance

Business History

(10/2014–Present)	Old Port Advisors - Portfolio Manager Associate
(11/2010-10/2014)	Investment Management & Consulting Group - Portfolio Manager Associate
(09/2005-10/2009)	Ameriprise Financial, Inc. – Assoc. Financial Advisor
(06/2004-09/2005)	American Express Financial Advisors – Assoc. Financial Advisor

Item 3 - Disciplinary Information

Ben Daigle does not have any disciplinary history to disclose.

Item 4 - Other Business Activities

Ben Daigle does not have any outside business activities.

Item 5 - Additional Compensation

Mr. Daigle is entitled to receive compensation from Old Port Advisors, in addition to salary, for generating new accounts.

Item 6 - Supervision

In the course of her supervisory duties as CCO, Erica Bly and compliance personnel under her supervision will periodically review advisory accounts, correspondence, and advisory activities of Mr. Daigle. Please contact Erica Bly at (207) 774-6552 with questions regarding supervision.

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Brochure Supplement – Richard A. Harlow, III

March 2022

This brochure supplement provides information about Richard A. "Chip" Harlow, III that supplements Old Port Advisors' brochure. You should have received a copy of that brochure. Please contact us at 207-774-6552 if you did not receive OPA's brochure or if you have any questions about the contents of this supplement.

Additional information about Chip Harlow, III is available on the SEC's website at www.adviserinfo.sec.gov.

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Item 2 - Educational Background and Business Experience

Chip Harlow, III was born in 1962.

Education

B.A. Degree Excelsior College – Finance

Designations

Chartered Retirement Planning Counselor (**CRPC**) – College of Financial Planning

Individuals who hold the CRPC® designation have completed a course of study encompassing pre-and post-retirement needs, asset management, estate planning and the entire retirement planning process using models and techniques from real client situations. Additionally, individuals must pass an end-of-course examination that tests their ability to synthesize complex concepts and apply theoretical concepts to real-life situations.

All designees have agreed to adhere to Standards of Professional Conduct and are subject to a disciplinary process.

Designees renew their designation every two-years by completing 16 hours of continuing education, reaffirming adherence to the Standards of Professional Conduct and complying with self-disclosure requirements.

Business History

(02/2016–Present)	Old Port Advisors - Vice President and Portfolio Manager
(02/2009-02/2016)	Ameriprise Financial – Associate Vice President and Financial Advisor
(09/1997-02/2009)	Merrill Lynch – Financial Advisor

Item 3 - Disciplinary Information

Chip Harlow does not have any disciplinary history to disclose.

Item 4 - Other Business Activities

There are no outside business activities for Mr. Harlow.

Item 5 - Additional Compensation

There is no additional compensation awarded to Mr. Harlow for providing advisory services.

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Item 6 - Supervision

In the course of her supervisory duties as CCO, Erica Bly and compliance personnel under her supervision will periodically review advisory accounts, correspondence, and advisory activities of Mr. Harlow. Please contact Erica Bly at (207) 774-6552 with questions regarding supervision.

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Brochure Supplement – Erica Bly

March 2022

This brochure supplement provides information about Erica Bly that supplements Old Port Advisors' brochure. You should have received a copy of that brochure. Please contact us at 207-774-6552 if you did not receive OPA's brochure or if you have any questions about the contents of this supplement.

Additional information about Erica Bly CRD# 5198589 is available on the SEC's website at www.adviserinfo.sec.gov.

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Item 2 - Educational Background and Business Experience

Erica Morgan Bly was born in 1980.

Education

Completed three years of undergraduate course work at Plymouth State College and University of Southern Maine.

Business History

(03/2019–Present)	Old Port Advisors – Chief Compliance Officer
(03/2017–02/2019)	Old Port Advisors – Portfolio Management Associate
(11/2016-03/2017)	Old Port Advisors – Client Administrator
(11/2011-11/2016)	Morgan Stanley Smith Barney – Client Service Associate
(03/2010-11/2011)	Merrill Lynch – Client Associate
(06/2009-03/2010)	Morgan Stanley Smith Barney – Client Service Associate
(07/2006-06/2009)	Citigroup Global Markets, Inc. – Client Service Associate

Item 3 - Disciplinary Information

Erica Bly has no disciplinary history to disclose.

Item 4 - Other Business Activities

Erica Bly has no outside business activities and/or affiliations to disclose.

Item 5 - Additional Compensation

There is no additional compensation awarded to Erica Bly for providing advisory services.

Item 6 - Supervision

In the course of her supervisory duties as CCO, Erica Bly and compliance personnel under her supervision will periodically review advisory accounts, correspondence, and advisory activities. The advice that Ms. Bly provides to clients is subject to periodic review by Tracy Rogers, Vice President. Please contact Erica Bly at (207) 774-6552 with questions regarding supervision.

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Brochure Supplement – Sharon Bunker

March 2022

This brochure supplement provides information about Sharon Bunker that supplements Old Port Advisors' brochure. You should have received a copy of that brochure. Please contact us at 207-774-6552 if you did not receive OPA's brochure or if you have any questions about the contents of this supplement.

Additional information about Sharon Bunker CRD# 2332427 is available on the SEC's website at www.adviserinfo.sec.gov.

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Item 2 - Educational Background and Business Experience

Sharon Eileen Bunker was born in 1968.

Education

Completed three years of undergraduate course work at University of Southern Maine.

Business History

(03/2017–Present)	Old Port Advisors – Relationship Manager
(04/2016-03/2017)	Old Port Advisors – Client Administrator
(04/2014-03/2016)	Commonwealth Financial Network – Senior Client Administrator
(04/2014-03/2016)	NVEST Financial Group, LLC. – Senior Client Administrator
(05/2013-01/2014)	Ameriprise Financial Services, Inc. – P2 Paraplanner
(02/2012-05/2013)	NPB Wealth Management – Registered Staff Member
(02/2012-05/2013)	Commonwealth Financial Network – Registered Staff Member

Designations

Chartered Retirement Planning Specialist ("CRPS®") 2008

The Chartered Retirement Planning Specialist or CRSP® designation is a retirement planning credential offered by the College for Financial Planning. The CRSP® designation requires the holder to participate in online study and to pass an online examination and to pay a fee. To maintain the CRSP® certification, CRSP® professionals must: complete 16 hours of continuing education every two years; reaffirm to abide by the Standards of Professional Conduct, Terms and Conditions; and complying with self-disclosure requirements.

Registered Paraplanner ("RP®") 2010

Individuals who hold the RP® designation have completed a course of study encompassing the financial planning process, the five disciplines of financial planning and general financial planning concepts, terminology and product categories. Individuals also complete a three-month long internship. Additionally, individuals must pass an end-of-course examination that tests their ability to synthesize complex concepts and apply theoretical concepts to real-life situations.

Al designees have agreed to adhere to Standards of Professional Conduct and are subject to a disciplinary process. Designees renew their designation every two-years by completing 16 hours of continuing education, reaffirming adherence to the Standards of Professional Conduct and complying with self-disclosure requirements.

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Item 3 - Disciplinary Information

Sharon Bunker has no disciplinary history to disclose.

Item 4 - Other Business Activities

Sharon Bunker has no outside business activities and/or affiliations to disclose.

Item 5 - Additional Compensation

There is no additional compensation awarded to Sharon Bunker for providing advisory services.

Item 6 - Supervision

In the course of her supervisory duties as CCO, Erica Bly and compliance personnel under her supervision will periodically review advisory accounts, correspondence, and advisory activities of Sharon Bunker. Please contact Erica Bly at (207) 774-6552 with questions regarding supervision.

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Brochure Supplement – Jake Kenyon

March 2022

This brochure supplement provides information about Jake Kenyon that supplements Old Port Advisors' brochure. You should have received a copy of that brochure. Please contact us at 207-774-6552 if you did not receive OPA's brochure or if you have any questions about the contents of this supplement.

Additional information about Jake Kenyon CRD# 6395909 is available on the SEC's website at www.adviserinfo.sec.gov.

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Item 2 - Educational Background and Business Experience

Jake Thomas Kenyon was born in 1987.

Education

Jake Kenyon obtained a Bachelor of Science from the University of Maine at Machias May 2010.

Business History

(08/2019–Present)	Old Port Advisors – Investment Adviser Representative
(04/2017 - 08/2019)	Horace Mann Companies – Licensed Producer
(04/2017 - 08/2019)	Horace Mann Investors, Inc – Registered Representative
(04/2017 - 08/2019)	True EDU Insurance & Retirement (Horace Mann) – Agent
(06/2016 - 04/2017)	InnoVest Financial Services – Assistant
(06/2016 - 04/2017)	HD Vest Investment Services – Registered Representative
(02/2016 - 06/2016)	MassMutual Life Insurance – Benefit Analyst
(10/2014 - 01/2016)	HD Vest Investment Services – Registered Representative
(09/2014 - 01/2016)	InnoVest Financial Services – Assistant
(05/2014 - 08/2014)	Camp Sloane YMCA – Boys Aquatic Director

Designations

CFP®
College of Financial Planning, Denver, CO

Minimum Designation Requirements

Certified Financial Planner (CFP)

The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP (with flame design) marks (collectively, the "CFP® marks") are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board").

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients. Currently, more than 62,000 individuals have obtained CFP® certification in the United States.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

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Prerequisites/Experience: Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year)

Educational Requirements: Complete an advanced college level course of study addressing the financial planning subject areas that CFP Board's studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a Bachelor's Degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP Board's financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning.

Examination Type: Pass the comprehensive CFP® Certification Examination. The examination, which consists of two 3-hour sessions separated by a 40-minute break, includes case studies and client scenarios designed to test one's ability to correctly diagnose financial planning Issues and apply one's knowledge of financial planning to real world circumstances.

Ethics: Agree to be bound by CFP Board's Standards of Professional/Conduct, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

Continuing Education/Experience Requirements: Complete 30 hours of continuing education hours every two years, including two hours on the Code of Ethics and other parts of the Standards of Professional Conduct to maintain competence and keep up with developments in the financial planning field.

Ethics: Renew an agreement to be bound by the Standards of Professional Conduct. The Standards prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board's enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

Item 3 - Disciplinary Information

Jake Kenyon has no disciplinary history to disclose.

Item 4 - Other Business Activities

Jake Kenyon is also a licensed life and health insurance agent. In this capacity he can affect transactions in insurance products for clients and earn commissions for these activities. We expect that clients to whom we offer advisory services may also be clients who purchase insurance products through Mr. Kenyon. Insurance commissions earned in these transactions are separate and distinct from our advisory

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fees. This creates a conflict of interest because of the receipt of additional compensation by Mr. Kenyon. Our clients are under no obligation to use Mr. Kenyon for insurance services and may use the insurance firm and agent of their choosing.

Item 5 - Additional Compensation

There is no additional compensation awarded to Jake Kenyon for providing advisory services.

Item 6 - Supervision

In the course of her supervisory duties as CCO, Erica Bly and compliance personnel under her supervision will periodically review advisory accounts, correspondence, and advisory activities of Jake Kenyon. Please contact Erica Bly at (207) 774-6552 with questions regarding supervision.

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Brochure Supplement – Clifford P. Ryan

March 2022

This brochure supplement provides information about Clifford Ryan that supplements Old Port Advisors' brochure. You should have received a copy of that brochure. Please contact us at 207-774-6552 if you did not receive OPA's brochure or if you have any questions about the contents of this supplement.

Additional information about Clifford Ryan CRD# 1218554 is available on the SEC's website at www.adviserinfo.sec.gov.

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Item 2 - Educational Background and Business Experience

Clifford P. Ryan was born in 1959

Education:

Mr. Ryan has successfully completed several university-level courses required to obtain the listed professional designations.

Business Background:

(08/2021 to Present) Investment Adviser Representative with Old Port Advisors

(11/1996 – 12/2021) President and IAR with Elder Planning Advisors of Maine, Inc.

Professional Designations

Chartered Life Underwriter (CLU)® 1993

Conferred by: The American College of Financial Services

Prerequisites/Experience Required:

- 3 years of full-time business experience within the five years preceding the awarding of the designation
- Educational Requirements: 5 core and 3 elective courses
- Examination Type: Final proctored exam for each course
- Continuing Education Requirements: 30 CE credits every 2 years

Chartered Financial Consultant (ChFC)®

Conferred by: The American College of Financial Services

Prerequisites/Experience Required:

- 3 years of full-time business experience within the five years preceding the awarding of the designation
- Educational Requirements: 6 core and 2 elective courses
- Examination Type: Final proctored exam for each course
- Continuing Education Requirements: 30 CE credits every 2 years

Item 3 - Disciplinary Information

Clifford P. Ryan has no disciplinary history to disclose.

Item 4 - Other Business Activities

Mr. Ryan is also a licensed life and health insurance agent. In this capacity he can affect transactions in insurance products for clients and earn commissions for these activities. We expect that clients to whom we offer advisory services may also be clients who purchase insurance products through Mr. Ryan. Insurance commissions earned in these transactions are separate and distinct from our advisory fees. This

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creates a conflict of interest because of the receipt of additional compensation by Mr. Ryan. Our clients are under no obligation to use Mr. Ryan for insurance services and may use the insurance firm and agent of their choosing.

Item 5 - Additional Compensation

There is no additional compensation awarded to Clifford Ryan for providing advisory services.

Item 6 - Supervision

In the course of her supervisory duties as CCO, Erica Bly and compliance personnel under her supervision will periodically review advisory accounts, correspondence, and advisory activities of Clifford Ryan. Please contact Erica Bly at (207) 774-6552 with questions regarding supervision.

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