



Lee Jones

IAR Brochure Supplement

Tangent Retirement Inc.

**14 Clover Ste. 43
Irvine, CA 92604**

This brochure supplement provides information about **Lee Jones** that supplements the **Tangent Retirement Inc.** brochure. You should have received a copy of that brochure. Please contact **Lee Jones, Chief Compliance Officer** if you did not receive **Tangent Retirement's** brochure or if you have any questions about the contents of this supplement.

Additional information about **Lee Jones** is also available on the SEC's website at **www.adviserinfo.sec.gov** by searching CRD#: **4596168**.

Item 2: Educational Background and Business Experience

Lee Jones

Year of Birth: 1980

Formal Education:

- **University of Redlands** – Bachelor of Science in Business Management, 2014
- **Scottsdale Community College** – Finance, 2002

Business Background (Last 5 Years):

- **02/2021 to Present: Tangent Retirement Inc.**

Position: Investment Advisor Representative

- **01/2026 to March 2026: Ascentis Independent Advisors**

Position: Independent Financial Advisor

- **02/2021 to 01/2026:** Golden State Equity Partners (Position: Independent Financial Advisor) (*Note: Firm acquired by Ascentis Independent Advisors*)

- **12/2013 to 02/2021: Stratos Wealth Partners**

Position: Wealth Manager

- **12/2012 to 02/2021: LPL Financial**

Position: Registered Representative

Professional Designations:

- **Series 65 Exam** (Passed 2011)

Item 3: Disciplinary Information

Lee Jones does not have any history of reportable legal or disciplinary events.

Lee Jones March 2026

Item 4: Other Business Activities

Insurance Agency Activities Lee Jones is independently licensed to sell insurance and annuity products through various insurance companies. When acting in this capacity, Mr. Jones will receive commissions for selling insurance and annuity products.

Conflict of Interest: Mr. Jones receives commissions from the sale of insurance products, which presents a conflict of interest. The client is under no obligation to act on the investment adviser's or associated person's recommendations. If the client elects to act on any of the recommendations, the client is under no obligation to effect the transaction through the investment adviser or the associated person when such person is employed as an agent with a licensed broker-dealer or is licensed as a broker-dealer or through any associate or affiliate of such person.

Mitigation: To address this conflict, Mr. Jones always acts in the best interest of the client. Clients are advised that they are under no obligation to purchase insurance products through Mr. Jones and may purchase these products through any insurance agent of their choice.

Item 5: Additional Compensation

Other than the insurance commissions described in Item 4 above, Lee Jones does not receive any economic benefit from any person, company, or organization, other than **Tangent Retirement Inc.**, in exchange for providing clients advisory services.

Item 6: Supervision

Lee Jones is the Chief Compliance Officer (CCO) of **Tangent Retirement Inc.** As such, he is responsible for supervising his own activities and adhering to the firm's Code of Ethics and compliance manual.

Supervisor Contact Information: Lee Jones, Chief Compliance Officer **Phone:** 949-345-1841

Item 7: Requirements for State-Registered Advisers

Lee Jones has not been involved in any arbitration claims, civil or administrative proceedings, or self-regulatory organization (SRO) proceedings. Mr. Jones has not been the subject of a bankruptcy petition.