



Apex Capital Management, LLC

Part 2B Form ADV Brochure Supplement

2/3/2025

Charles J. Duchamp, CPA
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Supervised from:
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This Form ADV 2B ("Brochure Supplement") provides information about the background and qualifications of Charles J. Duchamp (CRD# 4609290) that supplements the Apex Capital Management, LLC ("Apex" or the "Advisor", CRD# 117059) ADV Part 2 - Disclosure Brochure. You should have received a copy. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of the ADV Part 2 Disclosure Brochure for Apex Capital Management, LLC, or this ADV Part 2B Brochure Supplement, please contact us at (337) 895-0800.

Additional information about Charles J. Duchamp is available on the SEC's website at www.adviserinfo.sec.gov by searching with his full name or his Individual CRD# 4609290.



Charles J. Duchamp, CPA

Year of Birth 1959
CRD# 4609290

ITEM 2: EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Educational Background:

University of Southwestern Louisiana: BS/BA in Accounting, 1981

Business Experience:

Investment Advisor Representative, Apex Capital Management, LLC	11/2002 to Present
Owner, CPA and CEO, Charles J. Duchamp, Ltd. (APAC)	01/1991 to Present

Professional Designations:

Certified Public Accountant (CPA)

Certified Public Accountants (CPA) are licensed and regulated by their state boards of accountancy. While state laws and regulations vary, the education, experience and testing requirements for licensure as a CPA generally include minimum college education (typically 150 credit hours with at least a baccalaureate degree and a concentration in accounting), minimum experience levels (most states require at least one year of experience providing services that involve the use of accounting, attest, compilation, management advisory, financial advisory, tax or consulting skills, all of which must be achieved under the supervision of or verification by a CPA), and successful passage of the Uniform CPA Examination. In order to maintain a CPA license, states generally require the completion of 40 hours of continuing professional education (CPE) each year (or 80 hours over a two-year period, or 120 hours over a 3-year period). Additionally, all American Institute of Certified Public Accountants (AICPA) members are required to follow a rigorous Code of Professional Conduct which requires that they act with integrity, objectivity, due care, competence, fully disclose any conflicts of interest (and obtain client consent if a conflict exists), maintain client confidentiality, disclose to the client any commission or referral fees, and serve the public interest when providing financial services.

In addition to the Code of Professional Conduct, AICPA members who provide personal financial planning services are required to follow the Statement on Standards in Personal Financial Planning Services (the Statement). Most state boards of accountancy define

financial planning as the practice of public accounting and therefore have jurisdiction over CPAs practicing in this discipline; state boards would likely look to the Statement as the authoritative guidance in this practice area regardless of specific or blanket adoption of AICPA standards.

ITEM 3: DISCIPLINARY INFORMATION

Charles J. Duchamp has no legal, civil or disciplinary events to disclose. Charles J. Duchamp has never been involved in any regulatory, civil or criminal action. Additional Information about Charles J. Duchamp is available on the SEC's website at www.adviserinfo.sec.gov by searching with his full name or Individual CRD# 4609290.

ITEM 4: OTHER BUSINESS ACTIVITIES

Charles J. Duchamp is a Certified Public Accountant (CPA) with Charles J. Duchamp, Ltd. (APAC) ("CJD"). If he determines that an advisory client needs tax or accounting services, the client may be referred to CJD. In addition, if accounting clients of CJD are in need of financial planning or other advisory services, Charles J. Duchamp acting in his separate capacity as a CPA, may refer those clients to Apex Capital Management, LLC for advisory services. Clients are not obligated in any manner to use the services or accounting firm recommended by Charles J. Duchamp. If a client of Apex Capital Management, LLC also becomes an accounting client of CJD, the client is charged separately for the accounting services.

ITEM 5: ADDITIONAL COMPENSATION

Charles J. Duchamp has additional business activities where compensation is received that are detailed in item 4 above.

Certain product sponsors may provide Charles J. Duchamp with other economic benefits as a result of his recommending or selling the product sponsors' investments. The economic benefits he may receive from product sponsors can include, but are not limited to, financial assistance or the sponsorship of conferences and educational sessions, marketing support, inventive awards, payment of travel expenses, and tools to assist him in providing various services to clients.

Apex Capital Management, LLC and Charles J. Duchamp endeavor at all times to put the interest of the clients ahead of their own interests or those of the advisor's officers, directors, or representatives. However, these arrangements could affect Charles J. Duchamp's judgment when recommending investment products and present a conflict of interest that may affect his judgment.



ITEM 6: SUPERVISION

Charles J. Duchamp is supervised by Robert J. Morella, the Chief Compliance Officer of Apex. Our investment adviser representatives and employees are required to adhere to our compliance policies and procedures in the performance of their daily activities and responsibilities. Our compliance policies and procedures include an overview of the various statutes and regulations governing investment advisory activities and are designed to comply with applicable regulations and to facilitate the timeliness and quality of our compliance activities.

Robert J. Morella, Apex Capital Management, LLC's Chief Compliance Officer, is responsible for supervising all activities provided by the firm and its representatives, including Charles J. Duchamp. Robert Morella can be contacted at 337-895-0800.