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Summary of Materials Changes
To
Form ADV Part 2A
March 20, 2024

You have received this notification because you are currently a client of Anchor Capital Advisors, LLC, (Anchor), an investment adviser registered with the Securities and Exchange Commission (SEC). In accordance with Rule 204-3 under the Investment Advisers Act of 1940, Anchor is required to deliver to each client a summary of material changes that includes an offer to provide a copy of the updated firm brochure. Form ADV Part 2A (the Brochure) provides information about the qualifications and business practices of Anchor. A copy of the Brochure is included. You may also obtain a copy, free of charge, by contacting Anchor via email at info@AnchorCapital.com by telephone at 617.338.3800, or online at <https://anchorcapital.com/>.

The Brochure, dated March 20, 2024, contains the following material change from the previously annual amended Brochure dated March 9, 2023:

- An incident has occurred wherein an employee inadvertently neglected to notify compliance of a change in residency, resulting in inadequate registration with the office of financial regulation in that state. Prompt measures were taken to address this oversight, resulting in Anchor Capital expeditiously resolving the matter by paying an administrative fine. See Item 9 for additional details.
- Effective 1/1/2024 in addition to asset-based fees, Anchor Capital will allow certain clients to contract for stand-alone Financial Planning services for an hourly or flat fee. See Item 5 for additional details.