



## Item 1- Cover Page

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This Brochure Supplement provides information about Jonathan M. Davis that supplements the TLG Advisors, Inc. Brochure. You should have received a copy of that Brochure. Please contact TLG Advisors, Inc. if you did not receive TLG Advisors, Inc.'s Brochure or if you have any questions about the contents of this supplement.

Additional information about Jonathan M. Davis is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2- Educational Background and Business Experience

Jonathan Davis was born in 1981. Mr. Davis earned his BA from the University of Mississippi. In August of 2013 he joined The Leaders Group, Inc. as a registered Representative and was an investment advisor at Sowell Management from 2012 to 2017. Prior to that Mr. Davis was with New England Securities from 2005 to 2009 and with LPL Financial from 2009 to 2012.



### **Item 3- Disciplinary Information**

Registered investment advisers are required to disclose all relevant facts about any legal or disciplinary issues that you need to know about before deciding to invest your money with them. Mr. Davis has no such issues on his record.

### **Item 4- Other Business Activities**

Mr. Davis may sell commission-based products, including insurance and annuities, as a registered representative of The Leaders Group, Inc., a FINRA-registered broker-dealer. Mr. Davis may also receive compensation from the servicing of, non-variable, group insurance programs. He serves as a FINRA Non-Public Arbitrator. Mr. Davis is affiliated with Leinster Financial and Rivertree Financial Planning.

### **Item 5- Additional Compensation**

Mr. Davis provides investment-planning advice to his customers on a fee basis. Also, if you purchase a commission-based product from him, he will explain how he is paid and how it differs from a fee-based transaction. In addition, he may receive compensation from the activities detailed in Item 4 above.

### **Item 6 - Supervision**

We supervise our investment advisor representatives in the following ways:

- Compare activity in your account with your investment objectives;
- Ensure that your financial information and investment objectives have been recorded;
- Confirm that you are contacted annually to find out if there are any changes in your financial information or investment objectives;
- Verify that you receive quarterly statements;
- Make sure your advisory fees are being charged correctly;
- Ensure that we comply with your wishes concerning directed brokerage arrangements;
- Check to see if you are invested in securities that don't match your risk tolerance.

Advisory representatives are supervised by Jane Riley, TLG Advisors, Inc. Chief Compliance Officer. She may be reached at 303-797-9080, or [compliance@leadersgroup.net](mailto:compliance@leadersgroup.net).