



## Item 1 - Cover Page

### **Joshua L. Curtis**

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This brochure supplement provides information about Joshua L. Curtis 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 TLGA's brochure or if you have any questions about the contents of this supplement.

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

## Item 2 – Educational Background and Business Experience

Mr. Curtis was born in 1981. Since 2016 he has been the President of Clarity Financial where he sells his fixed and variable insurance products. In 2018 he joined The Leaders Group, Inc. as a Registered Representative. In 2021 he passed his series 65 and registered with TLG Advisors, Inc. as an Investment



Advisor Representative. In 2023 he established and became the Managing Member of Gestalt Financial Group, LLC, a producer group for financial professionals to distribute fix products and advisor training resources.

### **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. Curtis has no such issues on his record.

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

Mr. Curtis sells commission-based products (such as insurance or annuities) as a registered representative of The Leaders Group, Inc., a FINRA-registered broker-dealer. He may also sell fixed insurance products to his clients. He's also the created of Portfolio Waterfall Member Resources where he offers his portfolio waterfall strategy to other financial professionals and firms. He's also a Managing Member of Gestalt Financial Group, LLC, a producer group for financial professionals to distribute fix products and advisor training resources.

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

Mr. Curtis provides investment-planning advice to his customers on a fee basis. If you were to 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 888-371-0013, or [compliance@tlgadvisors.net](mailto:compliance@tlgadvisors.net).