



## Item 1 - Cover Page

### **Joshua Morris**

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This brochure supplement provides information about Joshua Morris 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 Morris 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. Morris was born in 1985. He attended Liberty University. From 2018 until 2020 he was a Financial Advisor at Mass Mutual. From 2020 until 2024 was a financial advisor at Concourse Financial Group. In 2025 he joined The Leaders Group, Inc. as a Registered Representative and TLG Advisors, Inc. as an Investment Advisor Representative.

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

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

Mr. Morris sells commission-based products (such as insurance or annuities) as a registered representative of The Leaders Group, Inc., a FINRA-registered broker-dealer. He's also an agent at Valley View Advisors selling fixed insurance products. He also does business coaching and consulting.

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

Mr. Morris 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).