



## Item 1 - Cover Page

### **Jerry I. Rubin**

32000 Northwestern Hwy #125

Farmington Hills, MI 48334

248-873-3100 #1403

[JRubin@JerryRubin.net](mailto:JRubin@JerryRubin.net)

### **TLG Advisors, Inc.**

475 Springfield Ave.

Summit, NJ 07901

303-500-8943

[www.tlgadvisors.net](http://www.tlgadvisors.net)

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This brochure supplement provides information about Jerry I. Rubin 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 Jerry I. Rubin 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. Rubin was born in 1940. He attended college for 3 years and has been self-employed for over 48 years. He has worked as a Registered Representative, as well as an Insurance Agent.

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

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

Mr. Rubin sells commission-based products (such as insurance or annuities) as a registered representative of Simplicity Investments, Inc., a FINRA-registered broker-dealer. He also sells insurance as an independent insurance agent.

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

Mr. Rubin 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 303-500-8943, or [compliance@tlgadvisors.net](mailto:compliance@tlgadvisors.net).