



Varun K. Marneni, CFP[®], CEPA[®]

CPC Advisors, LLC
d/b/a
CPC Advisors

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October 28, 2025

**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Varun K. Marneni (CRD no. 5986060) that supplements the CPC Advisors brochure. You should have received a copy of that brochure. Contact us at 404-879-3000 if you did not receive CPC Advisor's brochure or if you have any questions about the contents of this supplement.

Additional information about Varun K. Marneni is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Varun K. Marneni, CFP®, CEPA®

Year of Birth: 1989

Formal Education After High School:

- University of Florida, BS, Finance, 2011

Business Background:

- CPC Advisors, President/Investment Adviser Representative/Chief Compliance Officer, 10/2025 - Present
- Consolidated Planning Corporation, President/Investment Adviser Representative/Chief Compliance Officer, 2/2025 – 10/2025
- Consolidated Planning Corporation, President/Investment Adviser Representative, 6/2024 – 2/2025
- Consolidated Planning Corporation, Executive Vice President/Investment Adviser Representative, 4/2015 - 6/2024
- Raymond James Financial Services Advisors, Inc., Investment Adviser Representative, 8/2014 - 10/2021
- Raymond James Financial Services Inc., Registered Representative, 11/2011 - Present

Certifications:

Certified Financial Planner (CFP®) (2016)

I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and I may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold CFP® certification. You may find more information about CFP® certification at www.cfp.net.

CFP® professionals have met CFP Board's high standards for education, examination, experience, and ethics. To become a CFP® professional, an individual must fulfill the following requirements:

- **Education** – Earn a bachelor's degree from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials.
- **Examination** – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual's ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.
- **Experience** – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.

- **Ethics** – Satisfy the *Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement* and agree to be bound by CFP Board's *Code of Ethics and Standards of Conduct* ("Code and Standards"), which sets forth the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements to remain certified and maintain the right to continue to use the CFP Board Certification Marks:

- **Ethics** – Commit to complying with CFP Board's *Code and Standards*. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.
- **Continuing Education** – Complete 30 hours of continuing education hours every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the *Code and Standards*.

Certified Exit Planning Advisor (CEPA®) (2022)

PROFESSIONAL DESIGNATION DISCLOSURES:

The Certified Exit Planning Advisor (CEPA®) credential is for professional advisors who want to effectively engage more business owners. Through the process of Exit Planning (the Value Acceleration Methodology™), owners can build more valuable companies, have stronger personal financial plans, and align their personal goals. Earning CEPA doesn't change your expertise, it enhances your ability to engage business owners and have value-added conversations around growth and exit.

Candidate must meet all the following requirements:

- Five years of full-time or equivalent experience working directly with business owners as a financial advisor, attorney, CPA, business broker, investment banker, commercial lender, estate planner, insurance professional, business consultant or in a related capacity.
- Undergraduate degree from a qualifying institution; if no qualifying degree must submit additional professional work experience (two years of relevant professional experience may be substituted for each year of required undergraduate studies).
- Exit Planning Institute member in good standing.

There is also a five-day educational program that is offered by Exit Planning Institute ("EPI"), exam and CEPA examination fee.

Continuing Education Credits: The CEPA program is approved for up to 19.5 CPE hours and 14.5 CFP® hours. 40 hours every three years is required to complete the CE requirements.

In addition, Mr. Marneni passed the Series 7 (General Securities Representative Examination), Series 24 (General Securities Principal Examination), and the Series 66 (Uniform Combined State Law Examination). He also received credit for the SIE (Securities Industry Essentials Examination) on

October 1, 2018.

Item 3 Disciplinary Information

Form ADV Part 2B requires disclosure of certain criminal or civil actions, administrative proceedings, and self-regulatory organization proceedings, as well as certain other proceedings related to suspension or revocation of a professional attainment, designation, or license. Mr. Marneni has no required disclosures under this item.

Item 4 Other Business Activities

Varun K. Marneni is a Registered Representative with Raymond James Financial Services, Inc. ("RJFS"). RJFS is a diversified financial services company engaged in the sale of specialized investment products. In this capacity, Mr. Marneni may recommend securities products offered by RJFS as part of your investment portfolio. If you purchase these products through Mr. Marneni, he will receive the customary commissions in his separate capacity as a Registered Representative of RJFS.

Additionally, Mr. Marneni could be eligible to receive incentive awards such as RJFS may offer. He may also receive 12b-1 fees from mutual funds that pay such fees. The receipt of additional compensation may give Mr. Marneni an incentive to recommend investment products based on the compensation received, rather than on your investment needs.

Varun K. Marneni is a licensed insurance agent. From time to time, he will offer clients advice or products from those activities. Clients should be aware that these services pay a commission and involve a conflict of interest, as commissionable products conflict with the fiduciary duties of a registered investment adviser. CPC Advisors always acts in the best interest of the client, including the sale of commissionable products to advisory clients. Clients always have the right to decide whether or not to utilize the services of any representative of CPC Advisors in such individual's outside capacities.

Item 5 Additional Compensation

Refer to the *Other Business Activities* section above for disclosures on Mr. Marneni's receipt of additional compensation as a result of his other business activities.

Also, refer to the *Fees and Compensation, Client Referrals and Other Compensation, and Other Financial Industry Activities and Affiliations* section(s) of CPC Advisors' firm brochure for additional disclosures on this topic.

Item 6 Supervision

CPC Advisors has adopted, and periodically updates, its compliance manual, which includes a formal Code of Ethics and Insider Trading Policies and Procedures, that outlines for each employee the rules and regulations to which they must adhere. CPC Advisors has appointed a Chief Compliance Officer who reviews and monitors employee activity with respect to these rules and regulations. In addition, CPC Advisors has adopted a Code of Ethics that requires each employee to always act in the best interest of clients.

In the supervision of our associated persons, advice provided is limited based on the restrictions set by CPC Advisors, and by internal decisions as to the types of investments that may be included in client portfolios. We conduct periodic reviews of client holdings and documented suitability information to provide reasonable assurance that the advice provided remains aligned with each client's stated

investment objectives and with our internal guidelines.

My supervisor is: Nick Hughes, VP, Operations

Supervisor phone number: 404-879-3000



Blake A. Flood, CFP[®]

CPC Advisors, LLC
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**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Blake A. Flood (CRD no. 2485222) that supplements the CPC Advisors brochure. You should have received a copy of that brochure. Contact us at 404-879-3000 if you did not receive CPC Advisors' brochure or if you have any questions about the contents of this supplement.

Additional information about Blake A. Flood is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Blake A. Flood, CFP®

Year of Birth: 1970

Formal Education after High School:

- Georgia State University, Masters, Business, 2001.
- University of Michigan, B.A., History, 1992.

Business Background for the Previous Five Years:

- CPC Advisors, Senior Vice President/Advisory Representative, 10/2025 to Present
- Consolidated Planning Corporation, Senior Vice President/Advisory Representative, 08/1998 – 10/2025.
- Raymond James Financial Services Advisors, Inc, Investment Adviser Representative, 04/2019 - 10/2021.
- Raymond James Financial Services, Inc., Registered Representative, 12/1998 - Present.

Certifications:

Certified Financial Planner (CFP®) (2005)

I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and I may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold CFP® certification. You may find more information about CFP® certification at www.cfp.net.

CFP® professionals have met CFP Board's high standards for education, examination, experience, and ethics. To become a CFP® professional, an individual must fulfill the following requirements:

- **Education** – Earn a bachelor's degree from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials.
- **Examination** – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual's ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.
- **Experience** – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.
- **Ethics** – Satisfy the *Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement* and agree to be bound by CFP Board's *Code of Ethics*

and Standards of Conduct ("Code and Standards"), which sets forth the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements to remain certified and maintain the right to continue to use the CFP Board Certification Marks:

- **Ethics** – Commit to complying with CFP Board's *Code and Standards*. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.
- **Continuing Education** – Complete 30 hours of continuing education hours every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the *Code and Standards*.

In addition, Mr. Flood passed the Series 6 (Investment Company Products/Variable Contracts Representative Examination), Series 7 (General Securities Representative Examination), and the Series 63 (Uniform Securities Agent State Law Examination) examinations. He also received credit for the SIE (Securities Industry Essentials Examination) on October 1, 2018.

Item 3 Disciplinary Information

Form ADV Part 2B requires disclosure of certain criminal or civil actions, administrative proceedings, and self-regulatory organization proceedings, as well as certain other proceedings related to suspension or revocation of a professional attainment, designation, or license. Mr. Flood has no required disclosures under this item.

Item 4 Other Business Activities

Mr. Flood is a registered representative with Raymond James Financial Services, Inc. ("RJFS"). RJFS is a diversified financial services company engaged in the sale of specialized investment products. In this capacity, Mr. Flood may recommend securities or insurance products offered by RJFS as part of your investment portfolio. If clients purchase these products through Mr. Flood, he will receive the customary commissions in his separate capacity as a registered representative of RJFS. Additionally, Mr. Flood could be eligible to receive incentive awards such as RJFS may offer. He may also receive 12b-1 fees from mutual funds that pay such fees. The receipt of additional compensation may give Mr. Flood an incentive to recommend investment products based on the compensation received, rather than on your investment needs.

Mr. Flood is separately licensed as an independent insurance agent. In this capacity, he can effect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by Mr. Flood for insurance-related activities. This presents a conflict of interest because Mr. Flood may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractual or otherwise, to purchase insurance products through any person affiliated with our firm.

Item 5 Additional Compensation

Please refer to the *Other Business Activities* section above for disclosures on Mr. Flood's receipt of additional compensation as a result of his activities as a registered representative of RJFS and a licensed insurance agent.

Also, please refer to the *Fees and Compensation* section and the *Client Referrals and Other Compensation* section of CPC Advisors' firm brochure for additional disclosures on this topic.

Item 6 Supervision

CPC Advisors has adopted, and periodically updates, its compliance manual, which includes a formal Code of Ethics and Insider Trading Policies and Procedures, that outlines for each employee the rules and regulations to which they must adhere. CPC Advisors has appointed a Chief Compliance Officer who reviews and monitors employee activity with respect to these rules and regulations. In addition, CPC Advisors has adopted a Code of Ethics that requires each employee to always act in the best interest of clients.

In the supervision of our associated persons, advice provided is limited based on the restrictions set by CPC Advisors, and by internal decisions as to the types of investments that may be included in client portfolios. We conduct periodic reviews of client holdings and documented suitability information to provide reasonable assurance that the advice provided remains aligned with each client's stated investment objectives and with our internal guidelines.

My supervisor is: Varun Kalyan Marneni, Chief Compliance Officer

Supervisor Phone Number: 404-879-3000



Adele V. Gipson, CFA, CFP[®], CPA

CPC Advisors, LLC
d/b/a
CPC Advisors

1475 Peachtree St. NE
Suite 750
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October 28, 2025

FORM ADV PART 2B
BROCHURE SUPPLEMENT

This brochure supplement provides information about Adele V. Gipson (CRD no. 5175273) that supplements the CPC Advisors brochure. You should have received a copy of that brochure. Contact us at 404-879-3000 if you did not receive CPC Advisors' brochure or if you have any questions about the contents of this supplement.

Additional information about Adele V. Gipson is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Adele V. Gipson, CFA, CFP[®], CPA

Year of Birth: 1967

Formal Education after High School:

- Christian Brothers College, B.S. Business Administration, 1989.

Business Background for the Previous Five Years:

- CPC Advisors, Financial Advisor/Investment Adviser Representative, 10/2025 - Present
- Consolidated Planning Corporation, Financial Advisor/Investment Adviser Representative, 05/2008 – 10/2025.
- Raymond James Financial Services Advisors, Inc, Investment Adviser Representative, 04/2019 - 10/2021.
- Raymond James Financial Services, Inc., Registered Representative, 05/2008 - Present.

Certifications:

Certified Financial Planner (CFP[®]) (2007)

I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP[®] professional, and I may use these and CFP Board’s other certification marks (the “CFP Board Certification Marks”). CFP[®] certification is voluntary. No federal or state law or regulation requires financial planners to hold CFP[®] certification. You may find more information about CFP[®] certification at www.cfp.net.

CFP[®] professionals have met CFP Board’s high standards for education, examination, experience, and ethics. To become a CFP[®] professional, an individual must fulfill the following requirements:

- **Education** – Earn a bachelor’s degree from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials.
- **Examination** – Pass the comprehensive CFP[®] Certification Examination. The examination is designed to assess an individual’s ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.
- **Experience** – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.
- **Ethics** – Satisfy the *Fitness Standards for Candidates for CFP[®] Certification and Former CFP[®] Professionals Seeking Reinstatement* and agree to be bound by CFP Board’s *Code of Ethics and Standards of Conduct* (“Code and Standards”), which sets forth the ethical and practice standards

for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements to remain certified and maintain the right to continue to use the CFP Board Certification Marks:

- **Ethics** – Commit to complying with CFP Board's *Code and Standards*. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.
- **Continuing Education** – Complete 30 hours of continuing education hours every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the *Code and Standards*.

Chartered Financial Analyst (CFA) (2000)

This designation is issued by the CFA Institute and is granted to individuals who meet one of the following prerequisites: possess an undergraduate degree and four years of professional experience investment decision making; or four years qualified work experience (full time, but not necessarily investment related). The candidate is required to follow a self-study program involving 250 hours of study for each of the following three disciplines: Level One: Ethics & Professional Standards; Level Two: Investment Tools & Asset Classes; and Level Three: Portfolio Management & Wealth Planning. Once the designation is issued, no further Continuing Education is required.

Certified Public Accountant (CPA) (1991): To qualify for a CPA certificate and licensure to practice public accounting, all CPA candidates must pass the Uniform CPA Examination. Candidates must also comply with education and experience requirements, which may vary from state to state.

In addition, Ms. Gipson passed the Series 7 (General Securities Representative Examination), and the Series 63 (Uniform Securities Agent State Law Examination) examinations. She also received credit for the SIE (Securities Industry Essentials Examination) on October 1, 2018.

Item 3 Disciplinary Information

Form ADV Part 2B requires disclosure of certain criminal or civil actions, administrative proceedings, and self-regulatory organization proceedings, as well as certain other proceedings related to suspension or revocation of a professional attainment, designation, or license. Ms. Gipson has no required disclosures under this item.

Item 4 Other Business Activities

Ms. Gipson is a registered representative with Raymond James Financial Services, Inc. ("RJFS"). RJFS is a diversified financial services company engaged in the sale of specialized investment products. In this capacity, Ms. Gipson may recommend securities or insurance products offered by RJFS as part of your investment portfolio. If clients purchase these products through Ms. Gipson, she will receive the customary commissions in her separate capacity as a registered representative of RJFS. Additionally, Ms. Gipson could be eligible to receive incentive awards such as RJFS may offer. She may also receive

12b-1 fees from mutual funds that pay such fees. The receipt of additional compensation may give Ms. Gipson an incentive to recommend investment products based on the compensation received, rather than on your investment needs.

Ms. Gipson is separately licensed as an independent insurance agent. In this capacity, she can effect transactions in insurance products for her clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by Ms. Gipson for insurance-related activities. This presents a conflict of interest because Ms. Gipson may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractual or otherwise, to purchase insurance products through any person affiliated with our firm.

Item 5 Additional Compensation

Please refer to the *Other Business Activities* section above for disclosures on Ms. Gipson's receipt of additional compensation as a result of her activities as a registered representative of RJFS and a licensed insurance agent.

Also, please refer to the *Fees and Compensation* section and the *Client Referrals and Other Compensation* section of CPC Advisors' firm brochure for additional disclosures on this topic.

Item 6 Supervision

CPC Advisors has adopted, and periodically updates, its compliance manual, which includes a formal Code of Ethics and Insider Trading Policies and Procedures, that outlines for each employee the rules and regulations to which they must adhere. CPC Advisors has appointed a Chief Compliance Officer who reviews and monitors employee activity with respect to these rules and regulations. In addition, CPC Advisors has adopted a Code of Ethics that requires each employee to always act in the best interest of clients.

In the supervision of our associated persons, advice provided is limited based on the restrictions set by CPC Advisors, and by internal decisions as to the types of investments that may be included in client portfolios. We conduct periodic reviews of client holdings and documented suitability information to provide reasonable assurance that the advice provided remains aligned with each client's stated investment objectives and with our internal guidelines.

My supervisor is: Varun Kalyan Marneni, Chief Compliance Officer

Supervisor Phone Number: 404-879-3000



An Independent Registered Investment Advisory Firm

Geri L. Lanning, CFP®

CPC Advisors, LLC

d/b/a

CPC Advisors

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October 28, 2025

**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Geri L. Lanning (CRD no. 7070409) that supplements the CPC Advisors brochure. You should have received a copy of that brochure. Contact us at (404) 879-3000 if you did not receive CPC Advisors' brochure or if you have any questions about the contents of this supplement.

Additional information about Geri L. Lanning is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Geri L. Lanning, CFP®

Year of Birth: 1987

Formal Education after High School:

- Kennesaw State University, Bachelor of Business Administration (BBA), Management, 2011
- Kennesaw State University, Bachelor of Business Administration (BBA), Accountancy, 2013

Business Background for the Previous Five Years:

- CPC Advisors, Financial Advisor, 10/2025 - Present
- Consolidated Planning Corporation, Financial Advisor, 11/2022 – 10/2025
- Raymond James Financial Services Advisors, Inc., Investment Adviser Representative, 05/2019 - 11/2022
- Raymond James Financial Services, Inc., Financial Advisor, 04/2019 - Present
- J. Thompson Ross Investments, Inc., Registered Associate, 02/2019 - Present
- Raymond James Financial Services, Inc., Branch Associate, 02/2019 - 04/2019

Certifications:

CERTIFIED FINANCIAL PLANNER™ (“CFP®”) (2022)

PROFESSIONAL DESIGNATION DISCLOSURES:

I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and I may use these and CFP Board’s other certification marks (the “CFP Board Certification Marks”). CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold CFP® certification. You may find more information about CFP® certification at www.cfp.net.

CFP® professionals have met CFP Board’s high standards for education, examination, experience, and ethics. To become a CFP® professional, an individual must fulfill the following requirements:

- **Education** – Earn a bachelor’s degree from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials.
- **Examination** – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual’s ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.

- **Experience** – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.
- **Ethics** – Satisfy the *Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement* and agree to be bound by CFP Board's *Code of Ethics and Standards of Conduct* ("Code and Standards"), which sets forth the ethical and practice standards for CFP® professionals.

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- **Ethics** – Commit to complying with CFP Board's *Code and Standards*. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.
- **Continuing Education** – Complete 30 hours of continuing education hours every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the *Code and Standards*.

Please refer directly to the website of the issuing organization for additional information about this credential.

Ms. Lanning passed the Series 7 (General Securities Representative Examination), and the Series 66 (Uniform Combined State Law Examination) examinations. She also received credit for the SIE (Securities Industry Essentials Examination) on March 16, 2019.

Item 3 Disciplinary Information

Form ADV Part 2B requires disclosure of certain criminal or civil actions, administrative proceedings, and self-regulatory organization proceedings, as well as certain other proceedings related to suspension or revocation of a professional attainment, designation, or license. Ms. Lanning has no required disclosures under this item.

Item 4 Other Business Activities

Ms. Lanning is a financial advisor with Raymond James Financial Services, Inc. ("RJFS"). RJFS is a diversified financial services company engaged in the sale of specialized investment products. In this capacity, Ms. Lanning may recommend securities offered by RJFS as part of your investment portfolio. If clients purchase these products through Ms. Lanning, she will receive the customary commissions in her separate capacity as a registered representative of RJFS. Additionally, Ms. Lanning could be eligible to receive incentive awards such as RJFS may offer. She may also receive 12b-1 fees from mutual funds that pay such fees. The receipt of additional compensation may give Ms. Lanning an

incentive to recommend investment products based on the compensation received, rather than on your investment needs. She spends approximately 24% of her time.

Other than what is disclosed above, Ms. Lanning does not actively engage in any other investment-related business or occupation, nor does she have an application pending to register as a broker-dealer, futures commission merchant ("FCM"), commodity pool operator ("CPO"), commodity trading advisor ("CTA"), or as an associated person of an FCM, CPO, or CTA.

Ms. Lanning is separately licensed as an independent insurance agent. In this capacity, she can effect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by Ms. Lanning for insurance-related activities. This presents a conflict of interest because Ms. Lanning may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractual or otherwise, to purchase insurance products through any person affiliated with our firm.

Additionally, she is not actively engaged in any other business or occupation for compensation, nor is she actively engaged in any other business activity or activities that provides a substantial source of income or involves a substantial amount of her time.

Item 5 Additional Compensation

Please refer to the *Other Business Activities* section above for disclosures on Ms. Lanning's receipt of additional compensation as a result of her activities as a financial advisor of RJFS.

Also, please refer to the *Fees and Compensation* section and the *Client Referrals and Other Compensation* section of CPC Advisors' firm brochure for additional disclosures on this topic.

Item 6 Supervision

CPC Advisors has adopted, and periodically updates, its compliance manual, which includes a formal Code of Ethics and Insider Trading Policies and Procedures, that outlines for each employee the rules and regulations to which they must adhere. CPC Advisors has appointed a Chief Compliance Officer who reviews and monitors employee activity with respect to these rules and regulations. In addition, CPC Advisors has adopted a Code of Ethics that requires each employee to always act in the best interest of clients.

In the supervision of our associated persons, advice provided is limited based on the restrictions set by CPC Advisors, and by internal decisions as to the types of investments that may be included in client portfolios. We conduct periodic reviews of client holdings and documented suitability information to provide reasonable assurance that the advice provided remains aligned with each client's stated investment objectives and with our internal guidelines.

My supervisor is: Varun Kalyan Marneni, Chief Compliance Officer

Supervisor Phone Number: 404-879-3000



Kyleigh M. Cobett
CPC Advisors, LLC
d/b/a
CPC Advisors

111 2nd Avenue NE, Suite 1250
St. Petersburg, FL 33701

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Suite 750
Atlanta, GA 30309

Telephone: 404-879-3000
Facsimile: 404-892-1970

October 28, 2025

FORM ADV PART 2B
BROCHURE SUPPLEMENT

This brochure supplement provides information about Kyleigh M. Cobett (CRD no. 5841337) that supplements the CPC Advisors brochure. You should have received a copy of that brochure. Contact us at (404) 879-3000 if you did not receive CPC Advisors' brochure or if you have any questions about the contents of this supplement.

Additional information about Kyleigh M. Cobett is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Kyleigh M. Cobett

Year of Birth: 1993

Formal Education after High School:

- University of South Florida, Bachelor of Arts, Economics, 2016

Business Background for the Previous Five Years:

- CPC Advisors, Associate, 10/2025 - Present
- Consolidated Planning Corporation, Associate, 9/2021 – 10/2025
- Raymond James Financial Services, Inc., Registered Representative, 06/2022 – Present
- Raymond James Financial, Wholesaler, 09/2019 - 09/2021
- Eckerd College, Associate Director, 02/2019 - 09/2019
- Raymond James Financial Services, Inc., Registered Representative, 07/2016 - 02/2019

Certifications:

None

Ms. Cobett passed the Series 7 (General Securities Representative Examination), and the Series 66 (Uniform Investment Adviser State Law Examination) examinations. She also received credit for the SIE (Securities Industry Essentials Examination) examination on December 29, 2018.

Item 3 Disciplinary Information

Form ADV Part 2B requires disclosure of certain criminal or civil actions, administrative proceedings, and self-regulatory organization proceedings, as well as certain other proceedings related to suspension or revocation of a professional attainment, designation, or license. Ms. Cobett has no required disclosures under this item.

Item 4 Other Business Activities

Ms. Cobett is a registered representative with Raymond James Financial Services Inc. ("RJFS"). RJFS is a diversified financial services company engaged in the sale of specialized investment products. In this capacity, Ms. Cobett may recommend securities offered by RJFS as part of your investment portfolio. If clients purchase these products through Ms. Cobett, she will receive the customary commissions in her separate capacity as a registered representative of RJFS. Additionally, Ms. Cobett could be eligible to receive incentive awards such as RJFS may offer. She may also receive 12b-1 fees from mutual funds that pay such fees. The receipt of additional compensation may give Ms. Cobett an incentive to recommend investment products based on the compensation received, rather than on your investment needs. She spends approximately 22% of her time.

Other than what is disclosed above, Ms. Cobett does not actively engage in any other investment-related business or occupation, nor does she have an application pending to register as a broker-dealer, futures commission merchant ("FCM"), commodity pool operator ("CPO"), commodity trading advisor ("CTA"), or as an associated person of an FCM, CPO, or CTA.

Ms. Cobett is separately licensed as an independent insurance agent. In this capacity, she can effect

transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by Ms. Cobett for insurance-related activities. This presents a conflict of interest because Ms. Cobett may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractual or otherwise, to purchase insurance products through any person affiliated with our firm.

Additionally, she is not actively engaged in any other business or occupation for compensation, nor is she actively engaged in any other business activity or activities that provides a substantial source of income or involves a substantial amount of her time.

Item 5 Additional Compensation

Please refer to the *Other Business Activities* section above for disclosures on Ms. Cobett's receipt of additional compensation as a result of her activities as a financial advisor with RJFS.

Also, please refer to the *Fees and Compensation* section and the *Client Referrals and Other Compensation* section of CPC Advisors' firm brochure for additional disclosures on this topic.

Item 6 Supervision

CPC Advisors has adopted, and periodically updates, its compliance manual, which includes a formal Code of Ethics and Insider Trading Policies and Procedures, that outlines for each employee the rules and regulations to which they must adhere. CPC Advisors has appointed a Chief Compliance Officer who reviews and monitors employee activity with respect to these rules and regulations. In addition, CPC Advisors has adopted a Code of Ethics that requires each employee to always act in the best interest of clients.

In the supervision of our associated persons, advice provided is limited based on the restrictions set by CPC Advisors, and by internal decisions as to the types of investments that may be included in client portfolios. We conduct periodic reviews of client holdings and documented suitability information to provide reasonable assurance that the advice provided remains aligned with each client's stated investment objectives and with our internal guidelines.

My supervisor is: Varun Kalyan Marneni, Chief Compliance Officer

Supervisor Phone Number: 404-879-3000



Michael J. McCool, CFP[®], CIMA[®]

CPC Advisors, LLC
d/b/a
CPC Advisors

**1475 Peachtree St. NE
Suite 750
Atlanta, GA 30309**

**Telephone: 404-879-3000
Facsimile: 404-892-1970**

October 29, 2025

**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Michael J. McCool (CRD no. 4408105) that supplements the CPC Advisors brochure. You should have received a copy of that brochure. Contact us at 404-879-3000 if you did not receive CPC Advisors' brochure or if you have any questions about the contents of this supplement.

Additional information about Michael J. McCool is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Michael J. McCool, CFP[®], CIMA[®]

Year of Birth: 1962

Formal Education after High School:

- Columbia University, B.A., Economics, 1984.

Business Background for the Previous Five Years:

- CPC Advisors, Financial Advisor/Investment Adviser Representative, 10/1/2025 - Present
- Consolidated Planning Corporation, Financial Advisor/Investment Adviser Representative, 05/2007 –10/1/2025.
- Raymond James Financial Services Advisors, Inc, Investment Adviser Representative, 1/2014 - 10/2021.
- Raymond James Financial Services, Inc., Financial Advisor/Registered Representative, 05/2007 - Present.

Certifications:

Certified Financial Planner (CFP[®]) (2005)

I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP[®] professional, and I may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). CFP[®] certification is voluntary. No federal or state law or regulation requires financial planners to hold CFP[®] certification. You may find more information about CFP[®] certification at www.cfp.net.

CFP[®] professionals have met CFP Board's high standards for education, examination, experience, and ethics. To become a CFP[®] professional, an individual must fulfill the following requirements:

- **Education** – Earn a bachelor's degree from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials.
- **Examination** – Pass the comprehensive CFP[®] Certification Examination. The examination is designed to assess an individual's ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.
- **Experience** – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.
- **Ethics** – Satisfy the *Fitness Standards for Candidates for CFP[®] Certification and Former CFP[®] Professionals Seeking Reinstatement* and agree to be bound by CFP Board's *Code of Ethics and Standards of Conduct* ("Code and Standards"), which sets forth the ethical and practice standards for CFP[®] professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements to remain certified and maintain the right to continue to use the CFP Board Certification Marks:

- **Ethics** – Commit to complying with CFP Board's *Code and Standards*. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.
- **Continuing Education** – Complete 30 hours of continuing education hours every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the *Code and Standards*.

Certified Investment Management Analyst (CIMA®) (2015)

Certified Investment Management Analyst (CIMA®) is a professional designation issued by the Investments & Wealth Institute. This designation provides advisors, consultants, and analysts with the tools to go beyond investment fundamentals. The program:

- Integrates practical knowledge with investment theory, with deep dives into advanced portfolio construction, accounting, and risk management.
- Delivers a systematic process to put this sophisticated knowledge into action - differentiating services, solutions, and outcomes.

Individuals must meet one of the following requirements:

- least three years of verified work experience in financial services and
- a satisfactory record of ethical conduct, as determined by Investments & Wealth Institute Admissions Committee

Upon passing the exam and paying the fee, individuals must pay the certification renewal fee and complete 40 hours of continuing education every two years.

In addition, Mr. McCool passed the Series 7 (General Securities Representative Examination), Series 31 (Futures Managed Funds Examination), Series 63 (Uniform Securities Agent State Law Examination), and the Series 65 (Uniform Investment Adviser Law Examination) examinations. He also received credit for the SIE (Securities Industry Essentials Examination) on October 1, 2018.

Item 3 Disciplinary Information

Form ADV Part 2B requires disclosure of certain criminal or civil actions, administrative proceedings, and self-regulatory organization proceedings, as well as certain other proceedings related to suspension or revocation of a professional attainment, designation, or license. Mr. McCool has no required disclosures under this item.

Item 4 Other Business Activities

Mr. McCool is a registered representative with Raymond James Financial Services, Inc. ("RJFS"). RJFS is a diversified financial services company engaged in the sale of specialized investment products. In

this capacity, Mr. McCool may recommend securities or insurance products offered by RJFS as part of your investment portfolio. If clients purchase these products through Mr. McCool, he will receive the customary commissions in his separate capacity as a registered representative of RJFS. Additionally, Mr. McCool could be eligible to receive incentive awards such as RJFS may offer. He may also receive 12b-1 fees from mutual funds that pay such fees. The receipt of additional compensation may give Mr. McCool an incentive to recommend investment products based on the compensation received, rather than on your investment needs.

Mr. McCool is separately licensed as an independent insurance agent. In this capacity, he can effect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by Mr. McCool for insurance-related activities. This presents a conflict of interest because Mr. McCool may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractual or otherwise, to purchase insurance products through any person affiliated with our firm.

Item 5 Additional Compensation

Please refer to the *Other Business Activities* section above for disclosures on Mr. McCool's receipt of additional compensation as a result of his activities as a registered representative of RJFS and a licensed insurance agent.

Also, please refer to the *Fees and Compensation* section and the *Client Referrals and Other Compensation* section of CPC Advisors' firm brochure for additional disclosures on this topic.

Item 6 Supervision

CPC Advisors has adopted, and periodically updates, its compliance manual, which includes a formal Code of Ethics and Insider Trading Policies and Procedures, that outlines for each employee the rules and regulations to which they must adhere. CPC Advisors has appointed a CCO who reviews and monitors employee activity with respect to these rules and regulations. In addition, CPC Advisors has adopted a Code of Ethics that requires each employee to always act in the best interest of clients.

In the supervision of our associated persons, advice provided is limited based on the restrictions set by CPC Advisors, and by internal decisions as to the types of investments that may be included in client portfolios. We conduct periodic reviews of client holdings and documented suitability information to provide reasonable assurance that the advice provided remains aligned with each client's stated investment objectives and with our internal guidelines.

My supervisor is: Varun Kalyan Marneni, Chief Compliance Officer

Supervisor Phone Number: 404-879-3000



An Independent Registered Investment Advisory Firm

Sarah B. Walker

CPC Advisors, LLC

d/b/a

CPC Advisors

**1475 Peachtree St. NE
Suite 750
Atlanta, GA 30309**

**Telephone: 404-879-3000
Facsimile: 404-892-1970**

October 28, 2025

**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Sarah B. Walker (CRD no.) that supplements the CPC Advisors brochure. You should have received a copy of that brochure. Contact us at (404) 879-3000 if you did not receive CPC Advisors' brochure or if you have any questions about the contents of this supplement.

Additional information about Sarah B. Walker is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Sarah B. Walker

Year of Birth: 1980

Formal Education after High School:

- Georgia State University, Bachelor of Arts, Finance, 2005

Business Background for the Previous Five Years:

- CPC Advisors, Investment Adviser Representative, 10/2025 - Present
- Consolidated Planning Corporation, Investment Adviser Representative, 04/2024 – 10/2025
- Raymond James Financial Services, Inc., Financial Advisor, 04/2024 - Present
- Ameriprise Financial Services, LLC, Financial Advisor, 09/2017 - 03/2024

Certifications:

None

Ms. Walker passed the Series 7 (General Securities Representative Examination), and the Series 66 (Uniform Combined State Law Examination) examinations. She also received credit for the SIE (Securities Industry Essentials Examination) examination on October 1, 2018.

Item 3 Disciplinary Information

Form ADV Part 2B requires disclosure of certain criminal or civil actions, administrative proceedings, and self-regulatory organization proceedings, as well as certain other proceedings related to suspension or revocation of a professional attainment, designation, or license. Ms. Walker has no required disclosures under this item.

Item 4 Other Business Activities

Ms. Walker is a registered representative of Raymond James Financial Services Inc. ("RJFS"). RJFS is a diversified financial services company engaged in the sale of specialized investment products. In this capacity, Ms. Walker may recommend securities offered by RJFS as part of your investment portfolio. If clients purchase these products through Ms. Walker, she will receive the customary commissions in her separate capacity as a registered representative of RJFS. Additionally, Ms. Walker could be eligible to receive incentive awards such as RJFS may offer. She may also receive 12b-1 fees from mutual funds that pay such fees. The receipt of additional compensation may give Ms. Walker an incentive to recommend investment products based on the compensation received, rather than on your investment needs. She spends approximately 10% of her time.

Other than what is disclosed above, Ms. Walker does not actively engage in any other investment-related business or occupation, nor does she have an application pending to register as a broker-dealer, futures commission merchant ("FCM"), commodity pool operator ("CPO"), commodity trading advisor ("CTA"), or as an associated person of an FCM, CPO, or CTA.

Ms. Walker is separately licensed as an independent insurance agent. In this capacity, she can effect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by Ms. Walker for insurance-related activities. This presents a conflict of interest because Ms. Walker may

have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractual or otherwise, to purchase insurance products through any person affiliated with our firm.

Additionally, she is not actively engaged in any other business or occupation for compensation, nor is she actively engaged in any other business activity or activities that provides a substantial source of income or involves a substantial amount of her time.

Item 5 Additional Compensation

Please refer to the *Other Business Activities* section above for disclosures on Ms. Walker's receipt of additional compensation as a result of her activities as a financial advisor with RJFS.

Also, please refer to the *Fees and Compensation* section and the *Client Referrals and Other Compensation* section of CPC Advisors' firm brochure for additional disclosures on this topic.

Item 6 Supervision

CPC Advisors has adopted, and periodically updates, its compliance manual, which includes a formal Code of Ethics and Insider Trading Policies and Procedures, that outlines for each employee the rules and regulations to which they must adhere. CPC Advisors has appointed a Chief Compliance Officer who reviews and monitors employee activity with respect to these rules and regulations. In addition, CPC Advisors has adopted a Code of Ethics that requires each employee to always act in the best interest of clients.

In the supervision of our associated persons, advice provided is limited based on the restrictions set by CPC Advisors, and by internal decisions as to the types of investments that may be included in client portfolios. We conduct periodic reviews of client holdings and documented suitability information to provide reasonable assurance that the advice provided remains aligned with each client's stated investment objectives and with our internal guidelines.

My supervisor is: Varun Kalyan Marneni, Chief Compliance Officer

Supervisor Phone Number: 404-879-3000



Toni M. Perez, AAMS®

**CPC Advisors, LLC d/b/a
CPC Advisors**

**3201 S. Cherokee Lane
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**Telephone: (770) 345-8008
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October 28, 2025

**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Toni M. Perez (CRD no. 6662088) that supplements the CPC Advisors brochure. You should have received a copy of that brochure. Contact us at (404) 879-3000 if you did not receive CPC Advisors' brochure or if you have any questions about the contents of this supplement.

Additional information about Toni M. Perez is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Toni M. Perez, AAMS®

Year of Birth: 1986

Formal Education after High School:

- University of South Florida, Bachelor of Science (BS), Finance, 2014

Business Background for the Previous Five Years:

- CPC Advisors, Financial Advisor, 10/2025 - Present
- Consolidated Planning Corporation, Financial Advisor, 11/2022 – 10/2025
- Raymond James Financial Services, Inc., Registered Representative, 03/2022 - Present
- Raymond James Financial Services Advisors, Inc., Investment Adviser Representative, 03/2022 - 11/2022
- J. Thompson Ross Investments, Inc., Client Investment Coordinator, 03/2022 - Present
- Unemployed, 08/2021 - 03/2022
- Charles Schwab & Co., Inc., VP, Financial Consultant, 03/2017 - 08/2021
- Charles Schwab Bank SSB, Shared Employee, 02/2017 - 08/2021

Certifications:

ACCREDITED ASSET MANAGEMENT SPECIALISTSM (“AAMS[®]”) (2020)

PROFESSIONAL DESIGNATION DISCLOSURES:

The Accredited Asset Management SpecialistSM, or AAMS[®] program, is a designation program for financial professionals. The program provides advisors with strong fundamental financial knowledge with a specific focus on asset management and investments.

The program is ideal for those looking to build stronger client relationships and provide more comprehensive advice. Students will learn to identify new investment opportunities and recognize insurance, tax, retirement, and estate issues.

The AAMS[®] designation streamlines the cost and time toward your next credential.

As you advance your career, the College recognizes the time and investment it takes to earn industry-recognized credentials. Upon completion of the AAMS[®], graduates receive exemption from course FP511 in the College's CFP[®] certification education program.

Plus, completion of professional designations programs can also help you fulfill continuing education (CE) requirements:

- If you are a CFP[®] professional, successful completion of the College's professional designation programs can qualify for CE credit for CFP[®] certification renewal as follows:
 - ADPA[®] designation program fulfills 22.5 hours
 - All other designation programs (except the FPQP[®], WMSSM and LUTCF[®] programs) fulfill 28 hours

- If you currently hold a professional designation from the College, completion of a new professional designation fulfills CE hours as part of the renewal of your current designation. All AAMS® designation holders are responsible for completing 16 hours of Continuing Education credits every two years.

Ms. Perez passed the Series 7 (General Securities Representative Examination), the Series 63 (Uniform Securities Agent State Law Examination) and the Series 66 (Uniform Combined State Law Examination) examinations. She also received credit for the SIE (Securities Industry Essentials Examination) on October 1, 2018.

Item 3 Disciplinary Information

Form ADV Part 2B requires disclosure of certain criminal or civil actions, administrative proceedings, and self-regulatory organization proceedings, as well as certain other proceedings related to suspension or revocation of a professional attainment, designation, or license. Ms. Perez has no required disclosures under this item.

Item 4 Other Business Activities

Ms. Perez is a registered representative with Raymond James Financial Services, Inc. ("RJFS"). RJFS is a diversified financial services company engaged in the sale of specialized investment products. In this capacity, Ms. Perez may recommend securities offered by RJFS as part of your investment portfolio. If clients purchase these products through Ms. Perez, she will receive the customary commissions in her separate capacity as a registered representative of RJFS. Additionally, Ms. Perez could be eligible to receive incentive awards such as RJFS may offer. She may also receive 12b-1 fees from mutual funds that pay such fees. The receipt of additional compensation may give Ms. Perez an incentive to recommend investment products based on the compensation received, rather than on your investment needs. She spends approximately 24% of her time.

Other than what is disclosed above, Ms. Perez does not actively engage in any other investment-related business or occupation, nor does she have an application pending to register as a broker-dealer, futures commission merchant ("FCM"), commodity pool operator ("CPO"), commodity trading advisor ("CTA"), or as an associated person of an FCM, CPO, or CTA.

Ms. Perez is separately licensed as an independent insurance agent. In this capacity, she can effect transactions in insurance products for her clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by Ms. Perez for insurance-related activities. This presents a conflict of interest because Ms. Perez may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractual or otherwise, to purchase insurance products through any person affiliated with our firm.

Additionally, she is not actively engaged in any other business or occupation for compensation, nor is she actively engaged in any other business activity or activities that provides a substantial source of income or involves a substantial amount of her time.

Item 5 Additional Compensation

Please refer to the *Other Business Activities* section above for disclosures on Ms. Perez's receipt of additional compensation as a result of her activities as a financial advisor of RJFS.

Also, please refer to the *Fees and Compensation* section and the *Client Referrals and Other Compensation* section of CPC Advisors' firm brochure for additional disclosures on this topic.

Item 6 Supervision

CPC Advisors has adopted, and periodically updates, its compliance manual, which includes a formal Code of Ethics and Insider Trading Policies and Procedures, that outlines for each employee the rules and regulations to which they must adhere. CPC Advisors has appointed a Chief Compliance Officer who reviews and monitors employee activity with respect to these rules and regulations. In addition, CPC Advisors has adopted a Code of Ethics that requires each employee to always act in the best interest of clients.

In the supervision of our associated persons, advice provided is limited based on the restrictions set by CPC Advisors, and by internal decisions as to the types of investments that may be included in client portfolios. We conduct periodic reviews of client holdings and documented suitability information to provide reasonable assurance that the advice provided remains aligned with each client's stated investment objectives and with our internal guidelines.

My supervisor is: Varun Kalyan Marneni, Chief Compliance Officer

Supervisor Phone Number: 404-879-3000



Joshua Ben Voisine, CFP®

CPC Advisors, LLC

d/b/a

CPC Advisors

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October 28, 2025

**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Joshua Ben Voisine (CRD no. 5354224) that supplements the CPC Advisors brochure. You should have received a copy of that brochure. Contact us at 404-879-3000 if you did not receive CPC Advisors' brochure or if you have any questions about the contents of this supplement.

Additional information about Joshua Ben Voisine is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Joshua Ben Voisine, CFP®

Year of Birth: 1977

Formal Education After High School:

- University of South Alabama, Bachelor of Science in Finance , 2000

Business Background:

- CPC Advisors, Investment Adviser Representative, 10/2025 - Present
- Consolidated Planning Corporation, Investment Adviser Representative, 04/2025 - 10/2025
- CPC Advisors, Relationship Manager, 12/2024 – Present
- Raymond James Financial Services Inc., Registered Representative, 12/2024 - Present
- Unemployed, Unemployed, 04/2024 -12/2024
- Curi RMB Capital LLC, Regional Director, Wealth Advisor, 02/2024 - 08/2024
- Curi Capital, Regional Director, Wealth Advisor, 02/2021 - 04/2024
- Ameris Bank Wealth Management, Wealth Advisor, 01/2015 - 07/2021

Certifications:

Certified Financial Planner (CFP®)

I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and I may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold CFP® certification. You may find more information about CFP® certification at www.cfp.net.

CFP® professionals have met CFP Board's high standards for education, examination, experience, and ethics. To become a CFP® professional, an individual must fulfill the following requirements:

- **Education** – Earn a bachelor's degree from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials.
- **Examination** – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual's ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.
- **Experience** – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.

- **Ethics** – Satisfy the *Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement* and agree to be bound by CFP Board's *Code of Ethics and Standards of Conduct* ("Code and Standards"), which sets forth the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements to remain certified and maintain the right to continue to use the CFP Board Certification Marks:

- **Ethics** – Commit to complying with CFP Board's *Code and Standards*. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.
- **Continuing Education** – Complete 30 hours of continuing education hours every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the *Code and Standards*.

Item 3 Disciplinary Information

Form ADV Part 2B requires disclosure of certain criminal or civil actions, administrative proceedings, and self-regulatory organization proceedings, as well as certain other proceedings related to suspension or revocation of a professional attainment, designation, or license. Mr. Voisine has no required disclosures under this item.

Item 4 Other Business Activities

Joshua Ben Voisine is a registered representative with Raymond James Financial Services, Inc. ("RJFS"). RJFS is a diversified financial services company engaged in the sale of specialized investment products. In this capacity, Mr. Voisine may recommend securities or insurance products offered by RJFS as part of your investment portfolio. If clients purchase these products through Mr. Voisine, he will receive the customary commissions in his separate capacity as a registered representative of RJFS. Additionally, Mr. Voisine could be eligible to receive incentive awards such as RJFS may offer. He may also receive 12b-1 fees from mutual funds that pay such fees. The receipt of additional compensation may give Mr. Voisine an incentive to recommend investment products based on the compensation received, rather than on your investment needs.

Additionally, he is not actively engaged in any other business or occupation for compensation, nor is he actively engaged in any other business activity or activities that provides a substantial source of income or involves a substantial amount of his time.

Item 5 Additional Compensation

Refer to the *Other Business Activities* section above for disclosures on Mr. Voisine's receipt of additional compensation as a result of his other business activities.

Also, refer to the *Fees and Compensation, Client Referrals and Other Compensation, and Other Financial Industry Activities and Affiliations* section(s) of CPC Advisors' firm brochure for additional disclosures on this topic.

Item 6 Supervision

CPC Advisors has adopted, and periodically updates, its compliance manual, which includes a formal Code of Ethics and Insider Trading Policies and Procedures, that outlines for each employee the rules and regulations to which they must adhere. CPC Advisors has appointed a CCO who reviews and monitors employee activity with respect to these rules and regulations. In addition, CPC Advisors has adopted a Code of Ethics that requires each employee to always act in the best interest of clients.

In the supervision of our associated persons, advice provided is limited based on the restrictions set by CPC Advisors, and by internal decisions as to the types of investments that may be included in client portfolios. We conduct periodic reviews of client holdings and documented suitability information to provide reasonable assurance that the advice provided remains aligned with each client's stated investment objectives and with our internal guidelines.

My supervisor is: Varun Kalyan Marneni, Chief Compliance Officer

Supervisor Phone Number: 404-879-3000



Nicholas J. Hughes

CPC Advisors, LLC
d/b/a
CPC Advisors

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Telephone: 404-879-3000
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October 28, 2025

FORM ADV PART 2B
BROCHURE SUPPLEMENT

This brochure supplement provides information about Nicholas J. Hughes (CRD no. 6739513) that supplements the CPC Advisors brochure. You should have received a copy of that brochure. Contact us at (404) 879-3000 if you did not receive CPC Advisors' brochure or if you have any questions about the contents of this supplement.

Additional information about Nicholas J. Hughes is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Nicholas J. Hughes

Year of Birth: 1991

Formal Education after High School:

- Schenectady County Community College, Associate in Applied Science, Criminal Justice, 2011
- University of Tampa, Bachelor of Science, Sports Management, 2013

Business Background for the Previous Five Years:

- CPC Advisors, VP Operations, 10/2025 - Present
- Consolidated Planning Corporation, Investment Adviser Representative, 04/2022 – 10/2025
- Consolidated Planning Corporation, Support Company / DBA, 07/2021 – 10/2025
- Raymond James Financial Services, Inc., Registered Representative, 07/2021 - Present
- Raymond James & Associates, Inc., Registered Associate, 01/2020 - 07/2021
- Raymond James Financial Services Advisors, Inc., Investment Adviser Representative, 11/2018 - 12/2019
- Raymond James Financial Services, Inc., Registered Associate, 11/2018 - 12/2019
- Edward Jones, Financial Advisor, 01/2017 - 10/2018
- Bank of America, NA, Financial Center Operations Manager, 06/2014 - 01/2017

Certifications:

None

Mr. Hughes passed the Series 7 (General Securities Representative Examination), Series 24 (General Securities Principal Examination), and the Series 66 (Uniform Combined State Law Examination) examinations. He also received credit for the SIE (Securities Industry Essentials Examination) on October 1, 2018.

Item 3 Disciplinary Information

Form ADV Part 2B requires disclosure of certain criminal or civil actions, administrative proceedings, and self-regulatory organization proceedings, as well as certain other proceedings related to suspension or revocation of a professional attainment, designation, or license. Mr. Hughes has no required disclosures under this item.

Item 4 Other Business Activities

Mr. Hughes is a registered representative with Raymond James Financial Services, Inc. ("RJFS"). RJFS is a diversified financial services company engaged in the sale of specialized investment products. In this capacity, Mr. Hughes may recommend securities offered by RJFS as part of your investment portfolio. If clients purchase these products through Mr. Hughes, he will receive the customary commissions in his separate capacity as a registered representative of RJFS. Additionally,

Mr. Hughes could be eligible to receive incentive awards such as RJFS may offer. He may also receive 12b-1 fees from mutual funds that pay such fees. The receipt of additional compensation may give Mr. Hughes an incentive to recommend investment products based on the compensation received, rather than on your investment needs.

Other than what is disclosed above, Mr. Hughes does not actively engage in any other investment-related business or occupation, nor does he have an application pending to register as a broker-dealer, futures commission merchant ("FCM"), commodity pool operator ("CPO"), commodity trading advisor ("CTA"), or as an associated person of an FCM, CPO, or CTA.

Additionally, he is not actively engaged in any other business or occupation for compensation, nor is he actively engaged in any other business activity or activities that provides a substantial source of income or involves a substantial amount of his time.

Item 5 Additional Compensation

Please refer to the *Other Business Activities* section above for disclosures on Mr. Hughes' receipt of additional compensation as a result of his activities as a registered representative of RJFS.

Also, please refer to the *Fees and Compensation* section and the *Client Referrals and Other Compensation* section of CPC Advisors' firm brochure for additional disclosures on this topic.

Item 6 Supervision

CPC Advisors has adopted, and periodically updates, its compliance manual, which includes a formal Code of Ethics and Insider Trading Policies and Procedures, that outlines for each employee the rules and regulations to which they must adhere. CPC Advisors has appointed a Chief Compliance Officer who reviews and monitors employee activity with respect to these rules and regulations. In addition, CPC Advisors has adopted a Code of Ethics that requires each employee to always act in the best interest of clients.

In the supervision of our associated persons, advice provided is limited based on the restrictions set by CPC Advisors, and by internal decisions as to the types of investments that may be included in client portfolios. We conduct periodic reviews of client holdings and documented suitability information to provide reasonable assurance that the advice provided remains aligned with each client's stated investment objectives and with our internal guidelines.

My supervisor is: Varun Kalyan Marneni, Chief Compliance Officer

Supervisor Phone Number: 404-879-3000



Patricia A. Hayton

CPC Advisors, LLC
d/b/a
CPC Advisors

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October 28, 2025

**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Patricia A. Hayton (CRD no. 3161358) that supplements the CPC Advisors brochure. You should have received a copy of that brochure. Contact us at (404) 879-3000 if you did not receive CPC Advisors brochure or if you have any questions about the contents of this supplement.

Additional information about Patricia A. Hayton is available on the SEC's website at

www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Patricia A. Hayton

Year of Birth: 1965

Formal Education after High School:

Patricia A. Hayton has no formal education after high school

Business Background for the Previous Five Years:

- CPC Advisors, Operations Manager/Financial Advisor, 10/2025 - Present
- Consolidated Planning Corporation, Operations Manager/Financial Advisor, 11/2022 – 10/2025
- Raymond James Financial Services, Inc., Financial Advisor, 07/2018 - Present
- Raymond James Financial Services Advisors Inc., Investment Adviser Representative, 07/2018 - 11/2022
- J Thompson Ross Investments, Registered Associate, 06/2010 - Present
- Wells Fargo Financial Advisors Financial Network, LLC, Branch Administration, 06/2010 - 08/2018

Certifications:

None

Ms. Hayton passed the Series 7 (General Securities Representative Examination), the Series 9 (General Securities Sales Supervisor - Options Module Examination), the Series 10 (General Securities Sales Supervisor - General Module Examination) and the Series 66 (Uniform Investment Adviser State Law Examination) examinations. She also received credit for the SIE (Securities Industry Essentials Examination) examination on October 1, 2018.

Item 3 Disciplinary Information

Form ADV Part 2B requires disclosure of certain criminal or civil actions, administrative proceedings, and self-regulatory organization proceedings, as well as certain other proceedings related to suspension or revocation of a professional attainment, designation, or license. Ms. Hayton has no required disclosures under this item.

Item 4 Other Business Activities

Ms. Hayton is a financial advisor with Raymond James Financial Services Inc. ("RJFS"). RJFS is a diversified financial services company engaged in the sale of specialized investment products. In this capacity, Ms. Hayton may recommend securities offered by RJFS as part of your investment portfolio. If clients purchase these products through Ms. Hayton, she will receive the customary commissions in her separate capacity as a registered representative of RJFS. Additionally, Ms. Hayton could be eligible to receive incentive awards such as RJFS may offer. She may also receive 12b-1 fees from mutual funds that pay such fees. The receipt of additional compensation may give Ms. Hayton an incentive to recommend investment products based on the compensation received, rather than on your investment needs. She spends approximately 10% of her time.

Other than what is disclosed above, Ms. Hayton does not actively engage in any other investment-related business or occupation, nor does she have an application pending to register as a broker-

dealer, futures commission merchant ("FCM"), commodity pool operator ("CPO"), commodity trading advisor ("CTA"), or as an associated person of an FCM, CPO, or CTA.

Additionally, she is not actively engaged in any other business or occupation for compensation, nor is she actively engaged in any other business activity or activities that provides a substantial source of income or involves a substantial amount of her time.

Item 5 Additional Compensation

Please refer to the *Other Business Activities* section above for disclosures on Ms. Hayton's receipt of additional compensation as a result of her activities as a financial advisor with RJFS.

Also, please refer to the *Fees and Compensation* section and the *Client Referrals and Other Compensation* section of CPC Advisors' firm brochure for additional disclosures on this topic.

Item 6 Supervision

CPC Advisors has adopted, and periodically updates, its compliance manual, which includes a formal Code of Ethics and Insider Trading Policies and Procedures, that outlines for each employee the rules and regulations to which they must adhere. CPC Advisors has appointed a Chief Compliance Officer who reviews and monitors employee activity with respect to these rules and regulations. In addition, CPC Advisors has adopted a Code of Ethics that requires each employee to always act in the best interest of clients.

In the supervision of our associated persons, advice provided is limited based on the restrictions set by CPC Advisors, and by internal decisions as to the types of investments that may be included in client portfolios. We conduct periodic reviews of client holdings and documented suitability information to provide reasonable assurance that the advice provided remains aligned with each client's stated investment objectives and with our internal guidelines.

My supervisor is: Varun Kalyan Marneni, Chief Compliance Officer

Supervisor Phone Number: 404-879-3000



Gregory P. Phillips

**CPC Advisors, LLC
d/b/a
CPC Advisors**

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October 28, 2025

**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Gregory P. Phillips (CRD no. 2202424) that supplements the CPC Advisors brochure. You should have received a copy of that brochure. Contact us at (404) 879-3000 if you did not receive CPC Advisors' brochure or if you have any questions about the contents of this supplement. Additional information about Gregory P. Phillips is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Gregory P. Phillips

Year of Birth: 1969

Formal Education after High School:

- Xavier University, Bachelor of Science, Business Management, 1991

Business Background for the Previous Five Years:

- CPC Advisors, Director of Compliance, 10/2025 - Present
- Consolidated Planning Corporation, Director of Compliance, 11/2023 – 10/2025
- CPC Advisors, Associate/Employee, 11/2023 - Present
- Raymond James Financial Services, Inc., Branch Manager, 11/2023 - Present
- Raymond James Financial Services, Inc., Division Supervision Manager, 07/2019 - 11/2023
- Raymond James Financial Services Advisors, Investment Adviser Representative, 07/2019 - 11/2023
- Raymond James & Associates, Inc., Senior Advisor, 08/2016 - 07/2019

Certifications:

None

Mr. Phillips passed the Series 4 (Registered Options Principal Examination), Series 7 (General Securities Representative Examination), Series 9 (General Securities Sales Supervisor - Options Module Examination), Series 10 (General Securities Sales Supervisor - General Module Examination), Series 24 (General Securities Principal Examination), Series 31 (Futures Managed Fund Examination), Series 63 (Uniform Securities Agent State Law Examination) and the Series 66 (Uniform Investment Adviser State Law Examination) examinations. He also received credit for the SIE (Securities Industry Essentials Examination) examination on October 1, 2018.

Item 3 Disciplinary Information

Form ADV Part 2B requires disclosure of certain criminal or civil actions, administrative proceedings, and self-regulatory organization proceedings, as well as certain other proceedings related to suspension or revocation of a professional attainment, designation, or license. Mr. Phillips has no required disclosures under this item.

Item 4 Other Business Activities

Mr. Phillips is a branch manager with Raymond James Financial Services Inc. ("RJFS"). RJFS is a diversified financial services company engaged in the sale of specialized investment products. In this capacity, Mr. Phillips may recommend securities offered by RJFS as part of your investment portfolio. If clients purchase these products through Mr. Phillips, he will receive the customary commissions in his separate capacity as a division supervision manager of RJFS. Additionally, Mr. Phillips could be eligible to receive incentive awards such as RJFS may offer. He may also receive 12b-1 fees from mutual funds that pay such fees. The receipt of additional compensation may give Mr. Phillips an incentive to recommend investment products based on the compensation received, rather than on your investment needs. He spends approximately 50% of his time.

Gregory P. Phillips is an associate of CPC Advisors ("CPC"). He spends approximately 50% of his time.

Other than what is disclosed above, Mr. Phillips does not actively engage in any other investment-related business or occupation, nor does he have an application pending to register as a broker-dealer, futures commission merchant ("FCM"), commodity pool operator ("CPO"), commodity trading advisor ("CTA"), or as an associated person of an FCM, CPO, or CTA.

Additionally, he is not actively engaged in any other business or occupation for compensation, nor is he actively engaged in any other business activity or activities that provides a substantial source of income or involves a substantial amount of his time.

Item 5 Additional Compensation

Please refer to the *Other Business Activities* section above for disclosures on Mr. Phillips's receipt of additional compensation as a result of his activities as a financial advisor with RJFS.

Also, please refer to the *Fees and Compensation* section and the *Client Referrals and Other Compensation* section of CPC Advisors' firm brochure for additional disclosures on this topic.

Item 6 Supervision

CPC Advisors has adopted, and periodically updates, its compliance manual, which includes a formal Code of Ethics and Insider Trading Policies and Procedures, that outlines for each employee the rules and regulations to which they must adhere. CPC Advisors has appointed a Chief Compliance Officer who reviews and monitors employee activity with respect to these rules and regulations. In addition, CPC Advisors has adopted a Code of Ethics that requires each employee to always act in the best interest of clients.

In the supervision of our associated persons, advice provided is limited based on the restrictions set by CPC Advisors, and by internal decisions as to the types of investments that may be included in client portfolios. We conduct periodic reviews of client holdings and documented suitability information to provide reasonable assurance that the advice provided remains aligned with each client's stated investment objectives and with our internal guidelines.

My supervisor is: Varun Kalyan Marneni, Chief Compliance Officer

Supervisor Phone Number: 404-879-3000



Brooks T. Garrett
d/b/a
CPC Advisors

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October 28, 2025

FORM ADV PART 2B
BROCHURE SUPPLEMENT

This brochure supplement provides information about Brooks T. Garrett (CRD no. 7379030) that supplements the CPC Advisors brochure. You should have received a copy of that brochure. Contact us at (404) 879-3000 if you did not receive CPC Advisors' brochure or if you have any questions about the contents of this supplement.

Additional information about Brooks T. Garrett is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Brooks T. Garrett

Year of Birth: 1999

Formal Education after High School:

- University of Georgia, Bachelor of Business Administration, Finance, 2021

Business Background for the Previous Five Years:

- CPC Advisors, Trading and Research Associate, 10/2025 - Present
- Consolidated Planning Corporation, Trading and Research Associate, 06/2021 - 10/2025
- Raymond James Financial Services, Inc., Registered Representative, 05/2021 - Present
- Aflac, Inc., Corporate FP&A Summer Analyst (Internship), 06/2020 - 08/2020
- University of Georgia, Student, 05/2017 - 05/2021

Professional Designations:

- **CFA – Chartered Financial Analyst**

The Chartered Financial Analyst (CFA) charter is a globally respected, graduate-level investment credential established in 1962 and awarded by CFA Institute - the largest global association of investment professionals.

There are currently more than 90,000 CFA charterholders working in 134 countries. To earn the CFA charter, candidates must: 1) pass three sequential, six-hour examinations; 2) have at least four years of qualified professional investment experience; 3) join CFA Institute as members; and 4) commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct.

High Ethical Standards

The CFA Institute Code of Ethics and Standards of Professional Conduct, enforced through an active professional conduct program, require CFA charterholders to:

- Place their clients' interests ahead of their own
- Maintain independence and objectivity
- Act with integrity
- Maintain and improve their professional competence
- Disclose conflicts of interest and legal matters

Global Recognition

Passing the three CFA exams is a difficult feat that requires extensive study (successful candidates report spending an average of 300 hours of study per level). Earning the CFA charter demonstrates mastery of many of the advanced skills needed for investment analysis and decision making in today's quickly evolving global financial industry. As a result, employers and clients are increasingly seeking CFA charterholders-often making the charter a prerequisite for employment.

Additionally, regulatory bodies in 22 countries and territories recognize the CFA charter as a proxy for meeting certain licensing requirements, and more than 125 colleges and universities around the world have incorporated a majority of the CFA Program curriculum into their own finance courses.

Comprehensive and Current Knowledge

The CFA Program curriculum provides a comprehensive framework of knowledge for

investment decision making and is firmly grounded in the knowledge and skills used every day in the investment profession. The three levels of the CFA Program test a proficiency with a wide range of fundamental and advanced investment topics, including ethical and professional standards, fixed-income and equity analysis, alternative and derivative investments, economics, financial reporting standards, portfolio management, and wealth planning.

The CFA Program curriculum is updated every year by experts from around the world to ensure that candidates learn the most relevant and practical new tools, ideas, and investment and wealth management skills to reflect the dynamic and complex nature of the profession.

To learn more about the CFA charter, visit www.cfainstitute.org.

Mr. Garrett passed the Series 7 (General Securities Representative Examination), and the Series 66 (Uniform Investment Adviser State Law Examination) examinations. He also passed the SIE (Securities Industry Essentials Examination) examination.

Item 3 Disciplinary Information

Form ADV Part 2B requires disclosure of certain criminal or civil actions, administrative proceedings, and self-regulatory organization proceedings, as well as certain other proceedings related to suspension or revocation of a professional attainment, designation, or license. Mr. Garrett has no required disclosures under this item.

Item 4 Other Business Activities

Mr. Garrett is a registered representative of Raymond James Financial Services Inc. ("RJFS"). RJFS is a diversified financial services company engaged in the sale of specialized investment products. In this capacity, Mr. Garrett may recommend securities offered by RJFS as part of your investment portfolio. If clients purchase these products through Mr. Garrett, he will receive the customary commissions in his separate capacity as a division supervision manager of RJFS. Additionally, Mr. Garrett could be eligible to receive incentive awards such as RJFS may offer. He may also receive 12b-1 fees from mutual funds that pay such fees. The receipt of additional compensation may give Mr. Garrett an incentive to recommend investment products based on the compensation received, rather than on your investment needs. He spends approximately 10% of his time.

Other than what is disclosed above, Mr. Garrett does not actively engage in any other investment-related business or occupation, nor does he have an application pending to register as a broker-dealer, futures commission merchant ("FCM"), commodity pool operator ("CPO"), commodity trading advisor ("CTA"), or as an associated person of an FCM, CPO, or CTA.

Additionally, he is not actively engaged in any other business or occupation for compensation, nor is he actively engaged in any other business activity or activities that provides a substantial source of income or involves a substantial amount of his time.

Item 5 Additional Compensation

Please refer to the *Other Business Activities* section above for disclosures on Mr. Garrett's receipt of additional compensation as a result of his activities as a financial advisor with RJFS. Also, please refer to the *Fees and Compensation* section and the *Client Referrals and Other Compensation* section of CPC Advisors' firm brochure for additional disclosures on this topic.

Item 6 Supervision

CPC Advisors has adopted, and periodically updates, its compliance manual, which includes a formal Code of Ethics and Insider Trading Policies and Procedures, that outlines for each employee the rules and regulations to which they must adhere. CPC Advisors has appointed a Chief Compliance Officer who reviews and monitors employee activity with respect to these rules and regulations. In addition, CPC Advisors has adopted a Code of Ethics that requires each employee to always act in the best interest of clients.

In the supervision of our associated persons, advice provided is limited based on the restrictions set by CPC Advisors, and internal decisions as to the types of investments that may be included in client portfolios. We conduct periodic reviews of client holdings and documented suitability information to provide reasonable assurance that the advice provided remains aligned with each client's stated investment objectives and with our internal guidelines.

My supervisor is: Varun Kalyan Marneni, Chief Compliance Officer
Supervisor Phone Number: 404-879-3000



Daren M. Sexton

CPC Advisors, LLC
d/b/a
CPC Advisors

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Facsimile: (678) 401-3948**

**1475 Peachtree St. NE
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**Telephone: (404) 879-3000
Facsimile: (404) 892-1970**

October 28, 2025

**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Daren M. Sexton (CRD no. 5603052) that supplements the CPC Advisors brochure. You should have received a copy of that brochure. Contact us at (404) 879-3000 if you did not receive CPC Advisors' brochure or if you have any questions about the contents of this supplement.

Additional information about Daren M. Sexton is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Daren M. Sexton

Year of Birth: 1981

Formal Education after High School:

- Georgia Southern University, Bachelor of Business Administration, Finance, 2003

Business Background for the Previous Five Years:

- CPC Advisors, Financial Advisor, 10/2025 - Present
- Consolidated Planning Corporation, Financial Advisor, 11/2022 – 10/2025
- Raymond James Financial Services, Inc., Senior Registered Associate, 07/2018 - Present
- Raymond James Financial Services Advisors, Inc., Investment Adviser Representative, 07/2018 - 11/2022
- J Thompson Ross Investments, Financial Advisor, 03/2010 - Present
- Wells Fargo Advisors Financial Network, LLC, Portfolio Administrator, 03/2010 - 07/2018

Certifications:

None

Mr. Sexton passed the Series 7 (General Securities Representative Examination), and the Series 66 (Uniform Combined State Law Examination) examinations. He also received credit for the SIE (Securities Industry Essentials Examination) on October 1, 2018.

Item 3 Disciplinary Information

Form ADV Part 2B requires disclosure of certain criminal or civil actions, administrative proceedings, and self-regulatory organization proceedings, as well as certain other proceedings related to suspension or revocation of a professional attainment, designation, or license. Mr. Sexton has no required disclosures under this item.

Item 4 Other Business Activities

Mr. Sexton is a senior registered associate with Raymond James Financial Services, Inc. ("RJFS"). RJFS is a diversified financial services company engaged in the sale of specialized investment products. In this capacity, Mr. Sexton may recommend securities offered by RJFS as part of your investment portfolio. If clients purchase these products through Mr. Sexton, he will receive the customary commissions in his separate capacity as a registered representative of RJFS. Additionally, Mr. Sexton could be eligible to receive incentive awards such as RJFS may offer. He may also receive 12b-1 fees from mutual funds that pay such fees. The receipt of additional compensation may give Mr. Sexton an incentive to recommend investment products based on the compensation received, rather than on your investment needs. He spends approximately 24% of his time.

Other than what is disclosed above, Mr. Sexton does not actively engage in any other investment-related business or occupation, nor does he have an application pending to register as a broker-dealer, futures commission merchant ("FCM"), commodity pool operator ("CPO"), commodity trading advisor ("CTA"), or as an associated person of an FCM, CPO, or CTA.

Mr. Sexton is separately licensed as an independent insurance agent. In this capacity, he can effect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by Mr. Sexton for insurance-related activities. This presents a conflict of interest because Mr. Sexton may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractual or otherwise, to purchase insurance products through any person affiliated with our firm.

Additionally, he is not actively engaged in any other business or occupation for compensation, nor is he actively engaged in any other business activity or activities that provides a substantial source of income or involves a substantial amount of his time.

Item 5 Additional Compensation

Please refer to the *Other Business Activities* section above for disclosures on Mr. Sexton's receipt of additional compensation as a result of his activities as a senior registered associate of RJFS.

Also, please refer to the *Fees and Compensation* section and the *Client Referrals and Other Compensation* section of CPC Advisors' firm brochure for additional disclosures on this topic.

Item 6 Supervision

CPC Advisors has adopted, and periodically updates, its compliance manual, which includes a formal Code of Ethics and Insider Trading Policies and Procedures, that outlines for each employee the rules and regulations to which they must adhere. CPC Advisors has appointed a Chief Compliance Officer who reviews and monitors employee activity with respect to these rules and regulations. In addition, CPC Advisors has adopted a Code of Ethics that requires each employee to always act in the best interest of clients.

In the supervision of our associated persons, advice provided is limited based on the restrictions set by CPC Advisors, and by internal decisions as to the types of investments that may be included in client portfolios. We conduct periodic reviews of client holdings and documented suitability information to provide reasonable assurance that the advice provided remains aligned with each client's stated investment objectives and with our internal guidelines.

My supervisor is: Varun Kalyan Marneni, Chief Compliance Officer

Supervisor Phone Number: 404-879-3000



David G. Hunter, CFA, CAIA, CSRIC®

CPC Advisors, LLC
d/b/a
CPC Advisors

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October 28, 2025

**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

This brochure supplement provides information about David G. Hunter (CRD no. 5308154) that supplements the CPC Advisors brochure. You should have received a copy of that brochure. Contact us at 404-879-3000 if you did not receive CPC Advisors' brochure or if you have any questions about the contents of this supplement.

Additional information about David G. Hunter is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

David G. Hunter, CFA, CAIA, CSRIC®

Year of Birth: 1982

Formal Education After High School:

- University of Florida, 2006, Bachelors, Economics

Business Background:

- CPC Advisors, Chief Investment Officer/Investment Adviser Representative, 10/2025 - Present
- Consolidated Planning Corporation, Chief Investment Officer/Investment Adviser Representative, 7/2016 - 10/2025
- Raymond James Financial Services Inc., Financial Advisor/Registered Representative, 7/2016 - Present

Certifications:

Chartered Financial Analyst® (CFA) (2011)

This designation is issued by the CFA Institute and is granted to individuals who meet one of the following prerequisites: possess an undergraduate degree and four years of professional experience investment decision making; or four years qualified work experience (full time, but not necessarily investment related). The candidate is required to follow a self-study program involving 250 hours of study for each of the following three disciplines: Level One: Ethics & Professional Standards; Level Two: Investment Tools & Asset Classes; and Level Three: Portfolio Management & Wealth Planning. Once the designation is issued, no further Continuing Education is required.

Chartered Alternative Investment Analyst (“CAIA”) (2013)

PROFESSIONAL DESIGNATION DISCLOSURES:

Chartered Alternative Investment Analyst (CAIA) is a professional designation granted by the Chartered Alternative Investment Analyst Association to candidates who have completed Level I and Level II examinations and was established to certify that the holders have met the association’s educational standard for specialists in the area of alternative investments. The alternative investments that a CAIA is trained to assess include hedge funds, venture capital, private equity, funds of funds, derivatives, and real estate investments.

In order to receive the designation, individuals must meet minimum education and experience requirements and must pass a two-level curriculum that includes topics ranging from qualitative analysis and trading theories of alternative investments to indexation and benchmarking.

Individuals must meet one of the following requirements:

- Bachelor's or equivalent degree and more than one year of business experience in the financial industry, or
- Four years of experience in the financial industry

Once certified, there are annual membership dues, and a self-evaluation tool to be completed every three years to maintain the designation.

Chartered SRI Counselor™(CSRIC®) (2020)

Chartered SRI Counselor™(CSRIC®) is a professional designation granted by the College for Financial Planning – a Kaplan Company. This designation provides a blend of foundational knowledge and scenario learning to work with sustainable, responsible, and impact (SRI) investments, alongside environmental, social, and governance (ESG) factors, for a variety of clients. It also provides experienced financial advisors and investment professionals with a foundation knowledge of the history, definitions, trends, portfolio construction principles, fiduciary responsibilities, and best practices for sustainable investing.

There are no prerequisites to get the CSRIC designation. Upon passing the exam and paying the fee, individuals must pay the renewal fee and complete 16 hours of continuing education every two years. In addition, Mr. Hunter passed the Series 6 (Investment Company Products/Variable Contracts Representative Examination), Series 7 (General Securities Representative Examination), Series 63 (Uniform Securities Agent State Law Examination), and the Series 66 (Uniform Combined State Law Examination) examinations. He also received credit for the SIE (Securities Industry Essentials Examination) on October 1, 2018.

Item 3 Disciplinary Information

Form ADV Part 2B requires disclosure of certain criminal or civil actions, administrative proceedings, and self-regulatory organization proceedings, as well as certain other proceedings related to suspension or revocation of a professional attainment, designation, or license. Mr. Hunter has no required disclosures under this item.

Item 4 Other Business Activities

David Hunter is a Registered Representative with Raymond James Financial Services, Inc. ("RJFS"). ("RJFS") is a diversified financial services company engaged in the sale of specialized investment products. In this capacity, Mr. Hunter may recommend securities or insurance products offered by ("RJFS") as part of your investment portfolio. If you purchase these products through Mr. Hunter, he will receive the customary commissions in his separate capacity as a Registered Representative of ("RJFS").

Additionally, Mr. Hunter could be eligible to receive incentive awards such as RJFS may offer. He may also receive 12b-1 fees from mutual funds that pay such fees. The receipt of additional compensation may give Mr. Hunter an incentive to recommend investment products based on the compensation received, rather than on your investment needs.

Item 5 Additional Compensation

Refer to the *Other Business Activities* section above for disclosures on Mr. Hunter's receipt of additional compensation as a result of his other business activities.

Also, refer to the *Fees and Compensation, Client Referrals and Other Compensation, and Other Financial Industry Activities and Affiliations* section(s) of CPC Advisors' firm brochure for additional disclosures on this topic.

Item 6 Supervision

CPC Advisors has adopted, and periodically updates, its compliance manual, which includes a formal Code of Ethics and Insider Trading Policies and Procedures, that outlines for each employee the rules and regulations to which they must adhere. CPC Advisors has appointed a Chief Compliance Officer who reviews and monitors employee activity with respect to these rules and regulations. In addition, CPC Advisors has adopted a Code of Ethics that requires each employee to always act in the best interest of clients.

In the supervision of our associated persons, advice provided is limited based on the restrictions set by CPC Advisors, and by internal decisions as to the types of investments that may be included in client portfolios. We conduct periodic reviews of client holdings and documented suitability information to provide reasonable assurance that the advice provided remains aligned with each client's stated investment objectives and with our internal guidelines.

My supervisor is: Varun Kalyan Marneni, Chief Compliance Officer

Supervisor Phone Number: 404-879-3000



Trevor K. Thompson, CFP[®], CPWA[®]

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d/b/a
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October 28, 2025

**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Trevor K. Thompson (CRD no. 4978856) that supplements the CPC Advisors brochure. You should have received a copy of that brochure. Contact us at 404-879-3000 if you did not receive CPC Advisors' brochure or if you have any questions about the contents of this supplement.

Additional information about Trevor K. Thompson is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Trevor K. Thompson, CFP[®], CPWA[®]

Year of Birth: 1969

Formal Education After High School:

- North Carolina State University, B.S. in Pulp and Paper Science and Technology, 1993

Business Background:

- CPC Advisors, Director of Financial Planning/Investment Adviser Representative, 10/2025 - Present
- Consolidated Planning Corporation, Director of Financial Planning/Investment Adviser Representative, 4/2017 - 10/2025
- Raymond James Financial Services Inc., Registered Representative, 4/2017 - Present

Certifications:

Certified Financial Planner (CFP[®]) (2009)

I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP[®] professional, and I may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). CFP[®] certification is voluntary. No federal or state law or regulation requires financial planners to hold CFP[®] certification. You may find more information about CFP[®] certification at www.cfp.net.

CFP[®] professionals have met CFP Board's high standards for education, examination, experience, and ethics. To become a CFP[®] professional, an individual must fulfill the following requirements:

- **Education** – Earn a bachelor's degree from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials.
- **Examination** – Pass the comprehensive CFP[®] Certification Examination. The examination is designed to assess an individual's ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.
- **Experience** – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.
- **Ethics** – Satisfy the *Fitness Standards for Candidates for CFP[®] Certification and Former CFP[®] Professionals Seeking Reinstatement* and agree to be bound by CFP Board's *Code of Ethics and Standards of Conduct* ("Code and Standards"), which sets forth the ethical and practice standards for CFP[®] professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements to remain certified and maintain the right to continue to use the CFP Board Certification Marks:

- **Ethics** – Commit to complying with CFP Board's *Code and Standards*. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.
- **Continuing Education** – Complete 30 hours of continuing education hours every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the *Code and Standards*.

CPWA® - Certified Private Wealth Advisor® (2024)

- The CPWA designation signifies that an individual has met initial and on-going experience, ethical, education, and examination requirements for the professional designation, which is centered on private wealth management topics and strategies for high-net-worth and ultra-high-net-worth clients. Prerequisites for the CPWA- designation are- a Bachelor's degree from an accredited college or university or one of the following designations or licenses- CIMA". CIMC ". CFA-'. CFP-'. ChFC". or CPA license- have an acceptable regulatory history as evidenced by FINRA Form U-4 or other regulatory requirements and five years of experience in financial services or delivering services to high-net-worth clients. CPWA- designees have completed a rigorous educational process that includes self-study requirements, and successful completion of a comprehensive examination. CPWA- designees at the Yale University School of Management are required to uphold IWI's Code of Professional Responsibility and Rules and Guidelines for Use of the Marks. CPWA- designees must report 40 hours of continuing education credits, including two ethics hours, every two years to maintain the certification. The designation is administered through the Investments and Wealth Institute (IWI).

In addition, Mr. Thompson passed the Series 7 (General Securities Representative Examination), and the Series 66 (Uniform Combined State Law Examination). He also received credit for the SIE (Securities Industry Essentials Examination) on October 1, 2018.

Item 3 Disciplinary Information

Form ADV Part 2B requires disclosure of certain criminal or civil actions, administrative proceedings, and self-regulatory organization proceedings, as well as certain other proceedings related to suspension or revocation of a professional attainment, designation, or license. Mr. Thompson has no required disclosures under this item.

Item 4 Other Business Activities

Trevor Thompson is a Registered Representative with Raymond James Financial Services, Inc. ("RJFS"). RJFS is a diversified financial services company engaged in the sale of specialized investment products. In this capacity, Mr. Thompson may recommend securities or insurance products offered by RJFS as part of your investment portfolio. If you purchase these products through Mr. Thompson, he will receive the customary commissions in his separate capacity as a Registered Representative of RJFS.

Additionally, Mr. Thompson could be eligible to receive incentive awards such as RJFS may offer. He may also receive 12b-1 fees from mutual funds that pay such fees. The receipt of additional compensation may give Mr. Thompson an incentive to recommend investment products based on the compensation received, rather than on your investment needs.

Mr. Thompson is separately licensed as an independent insurance agent. In this capacity, he can effect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by Mr. Thompson for insurance-related activities. This presents a conflict of interest because Mr. Thompson may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractual or otherwise, to purchase insurance products through any person affiliated with our firm.

Item 5 Additional Compensation

Refer to the *Other Business Activities* section above for disclosures on Mr. Thompson's receipt of additional compensation as a result of his other business activities.

Also, refer to the *Fees and Compensation, Client Referrals and Other Compensation, and Other Financial Industry Activities and Affiliations* section(s) of CPC Advisors' firm brochure for additional disclosures on this topic.

Item 6 Supervision

CPC Advisors has adopted, and periodically updates, its compliance manual, which includes a formal Code of Ethics and Insider Trading Policies and Procedures, that outlines for each employee the rules and regulations to which they must adhere. CPC Advisors has appointed a CCO who reviews and monitors employee activity with respect to these rules and regulations. In addition, CPC Advisors has adopted a Code of Ethics that requires each employee to always act in the best interest of clients.

In the supervision of our associated persons, advice provided is limited based on the restrictions set by CPC Advisors, and by internal decisions as to the types of investments that may be included in client portfolios. We conduct periodic reviews of client holdings and documented suitability information to provide reasonable assurance that the advice provided remains aligned with each client's stated investment objectives and with our internal guidelines.

My supervisor is: Varun Kalyan Marneni, Chief Compliance Officer

Supervisor Phone Number: 404-879-3000



Krista Elder Pritchett

**CPC Advisors, LLC
d/b/a
CPC Advisors**

**1475 Peachtree St. NE
Suite 750
Atlanta, GA 30309**

**Telephone: 404-879-3000
Facsimile: 404-892-1970**

October 28, 2025

**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Krista Elder Pritchett (CRD no. 7397431) that supplements the CPC Advisors brochure. You should have received a copy of that brochure. Contact us at (404) 879-3000 if you did not receive CPC Advisors' brochure or if you have any questions about the contents of this supplement.

Additional information about Krista Elder Pritchett is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Krista Elder Pritchett

Year of Birth: 1990

Formal Education after High School:

- Kennesaw State University, Bachelor of Science, Business Administration Economics, 2018

Business Background for the Previous Five Years:

- CPC Advisors, Senior Client Service Associate, 10/2025 - Present
- Consolidated Planning Corporation, Senior Client Service Associate, 06/2021 – 10/2025
- Raymond James Financial Services, Inc., Senior Client Service Associate, 08/2023 - Present

Certifications:

None

Mrs. Pritchett passed the Series 7 (General Securities Representative Examination) and the Series 66 (Uniform Investment Adviser State Law Examination) examinations. She also received credit for the SIE (Securities Industry Essentials Examination) examination on October 26, 2022.

Item 3 Disciplinary Information

Form ADV Part 2B requires disclosure of certain criminal or civil actions, administrative proceedings, and self-regulatory organization proceedings, as well as certain other proceedings related to suspension or revocation of a professional attainment, designation, or license. Mrs. Pritchett has no required disclosures under this item.

Item 4 Other Business Activities

Mrs. Pritchett is a Senior Client Service Associate with Raymond James Financial Services Inc. ("RJFS"). RJFS is a diversified financial services company engaged in the sale of specialized investment products. In this capacity, Ms. Pritchett may recommend securities offered by RJFS as part of your investment portfolio. If clients purchase these products through Ms. Pritchett, she will receive the customary commissions in his separate capacity as a division supervision manager of RJFS. Additionally, Ms. Pritchett could be eligible to receive incentive awards such as RJFS may offer. She may also receive 12b-1 fees from mutual funds that pay such fees. The receipt of additional compensation may give Ms. Pritchett an incentive to recommend investment products based on the compensation received, rather than on your investment needs.

Other than what is disclosed above, Ms. Pritchett does not actively engage in any other investment-related business or occupation, nor does she have an application pending to register as a broker-dealer, futures commission merchant ("FCM"), commodity pool operator ("CPO"), commodity trading advisor ("CTA"), or as an associated person of an FCM, CPO, or CTA.

Additionally, she is not actively engaged in any other business or occupation for compensation, nor is she actively engaged in any other business activity or activities that provides a substantial source of income or involves a substantial amount of his time.

Item 5 Additional Compensation

Please refer to the *Other Business Activities* section above for disclosures on Ms. Pritchett's receipt of additional compensation as a result of her activities as a financial advisor with RJFS.

Also, please refer to the *Fees and Compensation* section and the *Client Referrals and Other Compensation* section of CPC Advisors' firm brochure for additional disclosures on this topic.

Item 6 Supervision

CPC Advisors has adopted, and periodically updates, its compliance manual, which includes a formal Code of Ethics and Insider Trading Policies and Procedures, that outlines for each employee the rules and regulations to which they must adhere. CPC Advisors has appointed a Chief Compliance Officer who reviews and monitors employee activity with respect to these rules and regulations. In addition, CPC Advisors has adopted a Code of Ethics that requires each employee to always act in the best interest of clients.

In the supervision of our associated persons, advice provided is limited based on the restrictions set by CPC Advisors, and by internal decisions as to the types of investments that may be included in client portfolios. We conduct periodic reviews of client holdings and documented suitability information to provide reasonable assurance that the advice provided remains aligned with each client's stated investment objectives and with our internal guidelines.

My supervisor is: Varun Kalyan Marneni, Chief Compliance Officer

Supervisor Phone Number: 404-879-3000