Gary Henry Vogel dba Vogel Financial Group 3004 Deerwood Drive Waco, Texas 76710 Phone: 254-751-0036 Fax: 254-751-0835

121 COUNTRYSIDE COURT, STE 140 SOUTHLAKE, TX 76092 817-416-5970 817-336-5736

Dated March 31st, 2023



Purpose of the Brochure Supplement:

This brochure supplement provides information about our personnel listed above that supplements the Trinity Portfolio Advisors, LLC (TPA) brochure. You should have received a copy of that brochure. Please contact Jeri Liedl at (817) 416-7227 if you did not receive Trinity Portfolio Advisor's brochure or if you have any questions about the contents of this supplement.

Additional information about our personnel is available on the SEC's website at www.adviserinfo.sec.gov.

PART 2B OF FORM ADV: BROUCHURE SUPPLEMENT

Educational Background and Business Experience

Full Legal Name: Gary Henry Vogel Born: 1948

Post-Secondary Education:

Texas A&M University, BBA, Finance, 1970

Recent Business Experience:

Trinity Portfolio Advisors, LLC 11/2009 to present Investment Advisor Representative

MML Investors Services, Inc. 01/2004-11/2009 Advisor

Disciplinary Information

Gary Henry Vogel has no reportable disciplinary history.

Other Business Activities

Gary Henry Vogel is engaged in investment-related business outside of his role with Trinity Portfolio Advisors, LLC. Mr. Vogel, in his individual capacity, is also a licensed insurance agent with various other insurance companies, and in such capacity, may recommend, on a commission basis, the purchase of certain insurance products. Although TPA does not sell such insurance products to its investment advisory clients, TPA does permit its *Advisory Affiliates*, in their individual capacities as licensed insurance agents, to sell insurance products to its investment advisory clients. A potential conflict of interest may exist to the extent that Mr. Vogel recommends the purchase of insurance products where he receives insurance commissions or other additional compensation from any other insurance companies.

Gary Henry Vogel is engaged in a non-investment related business outside of his role with Trinity Portfolio Advisors, LLC. Mr. Vogel, in his individual capacity, owns a specified food related entity.

Additional Compensation

Gary Henry Vogel does not receive any economic benefit from a non-advisory client for the provision of advisory services. All client advisory service fees are paid directly to Trinity Portfolio Advisors, LLC.

Supervision

Supervisor: John A. Chalk, Jr. **Title:** Chief Compliance Officer **Phone Number:** (817) 416-7227

In addition to an annual in-person review of our firm's policies and procedures, each advisor is subject to the following ongoing supervision and review:

- Daily trade reviews
- Quarterly review of personal securities accounts
- Annual review of bank statements
- Monthly correspondence reviews, including ongoing capture and review of email
- Periodic reviews of client account activity