

Joe Wylie, CPA
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Dated March 1st, 2024



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.

Disclaimer:

While Trinity Portfolio Advisors, LLC, may refer to itself as a "registered investment advisor" or "RIA", clients should be aware that registration does not imply a certain level of skill or training.

Educational Background and Business Experience

Full Legal Name: Joe Wylie

Born: 1951

Post-Secondary Education:

- University of Oklahoma, BBA, Accounting, 1974

Recent Business Experience:

- Trinity Portfolio Advisors, LLC 11/2009 to present Investment Advisor Representative
- Gollob Morgan Peddy PC 09/2001 to 12/2012 Officer
- MML Investor Services, Inc. 07/2003-11/2009 Financial Advisor

Professional Designations:

Joe Wylie has earned the following designation(s) and is in good standing with the granting authority:

- **Certified Public Accountant (CPA)** - licensed and regulated by the Texas State Board of Accountancy. Designation requires meeting minimum education requirements, principally in business and accountancy, passing a uniform examination, and performing sufficient hours of public accounting work supervised by a licensee. Maintaining the designation generally requires 120 hours of continuing education in general areas (such as management) and specific technical areas (such as taxation) every three years.

Disciplinary Information

Joe Wylie has no reportable disciplinary history.

Other Business Activities

Joe Wylie is engaged in investment-related business outside of his role with Trinity Portfolio Advisors, LLC (TPA). Mr. Wylie, in his individual capacity, is also a licensed insurance agent with various 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 exists to the extent that Mr. Wylie recommends the purchase of insurance products where he receives insurance commissions or other additional compensation from any insurance company.

Joe Wylie is a Certified Public Accountant. TPA shall not receive referral fees from his accounting practice. TPA does not render accounting advice services to its clients. Rather, to the extent that a client requires accounting services, TPA, if requested, will recommend the services of a certified public accountant, all of which services shall be rendered independent of TPA pursuant to a separate agreement between the client and the certified public accountant. TPA shall not receive any of the fees charged by any recommended Certified Public Accountant, referral or otherwise.

Additional Compensation

Joe Wylie 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.

PART 2B OF FORM ADV: BROCHURE SUPPLEMENT

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