

# Trendz Advisors, Inc. ADV, Part II

## Brochure Supplement

Donald O. Taylor

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Trendz Advisors, Inc.  
265 Brookview Centre Way, Suite 504  
Knoxville, TN 37919  
CRD# 725947  
Registered with this firm since: 11/01/2011

### **PURPOSE OF THE BROCHURE SUPPLEMENT:**

This *BROCHURE SUPPLEMENT* provides information about Donald O. Taylor that supplements the Trendz Advisors, Inc. *FIRM BROCHURE* document. You should have received a copy of that *FIRM BROCHURE*. Please contact Donald O. Taylor if you did not receive Trendz Advisors, Inc.'s *FIRM BROCHURE* or if you have any questions about the contents of this *BROCHURE SUPPLEMENT*.

Additional information about Donald O. Taylor is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) (the CRD number for Donald O. Taylor is 725947).

**NOTE:** While Trendz Advisors, Inc may refer to itself as a "registered investment advisor" or "RIA," Clients should be aware that registration itself does not imply any level or skill or training.

### **EDUCATIONAL AND BUSINESS EXPERIENCE**

**Donald O. Taylor**, Investment Adviser Representative

#### *Education Business Background*

*Middle Tennessee State University, BS, 1980 Graduate*

TrustFirst Inc., owner and principal 1995-present

Trendz Advisors Inc., owner and President, 2007-present

PaineWebber 1991-1995, Investment Representative

First Tennessee Bond Division 1987-1991, Investment Representative

Investment Exams, S4 Options Principal, S6 Series 6 Investment Company and Variable Contracts

Products Representative, S7 General Securities Exam, S24 General Securities Registered Principal, S27

Financial Operations Principal, S53 Municipal Securities Principal, S63 State, S65 Uniform Investment

Adviser State Law Examination

## **DISCIPLINARY INFORMATION**

Donald O. Taylor has one (1) disciplinary event. Taylor was fined \$5,000 for violations in 2011 regarding net capital reporting for TrustFirst Inc. and escrow violations relating to a private placement in 2011. Prospective clients can view the CRD records (registration records) for Donald O. Taylor through the SEC's Investment Adviser Public Disclosure (IAPD) website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) or FINRA's BrokerCheck database online at [www.finra.org/brokercheck](http://www.finra.org/brokercheck). The CRD number for Donald O. Taylor is 725947. For any pending regulatory actions, see sites listed above.

## **OTHER BUSINESS ACTIVITIES**

In addition to being an investment adviser representative (hereafter "IA Rep") of Trendz Advisors Inc. and Donald O. Taylor Registered Investment Advisor, Donald O. Taylor is licensed as independent insurance agent in Tennessee.

Donald O. Taylor, as an IA Rep of TrustFirst Inc., may make recommendations on insurance products and may also, as an independent insurance agent, sell those recommended insurance products to advisory clients. When such recommendations or sales are made, a conflict of interest exists as Donald O. Taylor may earn insurance commissions for the sale of those products, which may create an incentive to recommend such products. Trendz Advisors Inc. requires that Donald O. Taylor disclose this conflict of interest when such recommendations are made.

Taylor serves as manager of TrustFirst Partners I, LLC, DG Properties I, LLC, DG Income Properties II, Tooles Bend Partners, LLC, NCDG Properties, LLC, Parsons Income Properties, LLC, Valley DG Properties, LLC, Tansi DG Investors LLC, and Cumberland River Income Properties LLC. These LLC partnerships have been formed to purchase income producing properties. He may sell these products to advisory clients. When such recommendations or sales are made, a conflict of interest exists as Donald O. Taylor may earn insurance commissions for the sale of those products, which may create an incentive to recommend such products. Trendz Advisors Inc. requires that Donald O. Taylor disclose this conflict of interest when such recommendations are made.

## **ADDITIONAL COMPENSATION**

Aside from the sales commissions paid by insurance companies to Donald O. Taylor (see the "OTHER BUSINESS ACTIVITIES" section above), Donald O. Taylor does not receive any additional compensation from non-clients for providing advisory services. All advisory compensation is paid by clients directly.

## **SUPERVISION**

As principal of Trendz Advisors, Donald O. Taylor is primarily responsible for supervision of Donald O. Taylor Registered Investment Advisor and its IA Reps.

## **REQUIREMENTS FOR STATE-REGISTERED ADVISERS**

Trendz Advisors Inc. would be required to disclose additional information for Donald O. Taylor if he had ever been the subject of a bankruptcy petition or ever been found liable in either: (a) an arbitration; or (b) a civil, self-regulatory organization, or administrative proceeding. As none of these apply to Donald O. Taylor, Trendz Advisors Inc. has no information to disclose in this regard.

# Trendz Advisors, Inc. ADV, Part II

## Brochure Supplement

### Leslie A. Grossman

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Trendz Advisors, Inc.  
265 Brookview Centre Way, Suite 504  
Knoxville, TN 37919  
CRD# 139528  
Registered with this firm since: 11/01/2011

#### **PURPOSE OF THE BROCHURE SUPPLEMENT:**

This *BROCHURE SUPPLEMENT* provides information about Leslie Grossman that supplements the TrustFirst, Inc. *FIRM BROCHURE* document. You should have received a copy of that *FIRM BROCHURE*. Please contact Leslie A. Grossman if you did not receive TrustFirst Inc's *FIRM BROCHURE* or if you have any questions about the contents of this *BROCHURE SUPPLEMENT*. Additional information about Leslie Grossman is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) (the CRD number for Leslie Grossman is 2029839).

**NOTE:** While TrustFirst, Inc may refer to itself as a "registered investment advisor" or "RIA," Clients should be aware that registration itself does not imply any level or skill or training.

#### **EDUCATIONAL AND BUSINESS EXPERIENCE**

**Leslie A. Grossman**, Investment Adviser Representative

##### *Education*

- B.A., Business, Communications, The University of Alabama, Tuscaloosa, 1979

- Vanderbilt School of Banking – 1989

Investment Adviser Representative, TrustFirst Inc. (2011-Present), providing investment advisory services.

Registered Securities Representative, TrustFirst Inc. (2001-Present)

Culver Financial Management, 1999-2001

Prudential Securities 1995-1999

J.C. Bradford & Co 1990-1995

Investment Exams, S7 General Securities Exam, S63 State, S65 Uniform Investment Adviser State Law Examination

## **DISCIPLINARY INFORMATION**

Leslie Grossman has not had any legal or disciplinary events in her past. Clients and prospective clients can view the CRD records (registration records) for Leslie Grossman through the SEC's Investment Adviser Public Disclosure (IAPD) website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) or FINRA's BrokerCheck database online at [www.finra.org/brokercheck](http://www.finra.org/brokercheck). The CRD number for Leslie Grossman is 2029839.

## **OTHER BUSINESS ACTIVITIES**

In addition to being an investment adviser representative (hereafter "IA Rep") of TrustFirst Inc. and Leslie Grossman Registered Investment Advisor, Leslie Grossman is licensed as an independent insurance agent in Tennessee.

Leslie Grossman, as an IA Rep of TrustFirst Inc., may make recommendations on insurance products and may also, as an independent insurance agent, sell those recommended insurance products to advisory clients. When such recommendations or sales are made, a conflict of interest exists as Leslie Grossman may earn insurance commissions for the sale of those products, which may create an incentive to recommend such products. TrustFirst Inc. requires that Leslie Grossman disclose this conflict of interest when such recommendations are made.

## **ADDITIONAL COMPENSATION**

Aside from the sales commissions paid by insurance companies to Leslie Grossman (see the "OTHER BUSINESS ACTIVITIES" section above), Leslie Grossman does not receive any additional compensation from non-clients for providing advisory services. All advisory compensation is paid by clients directly.

## **SUPERVISION**

As principal of TrustFirst, Donald O. Taylor is primarily responsible for supervision of Leslie Grossman Registered Investment Advisor and its IA Reps.

## **REQUIREMENTS FOR STATE-REGISTERED ADVISERS**

TrustFirst Inc. would be required to disclose additional information for Leslie Grossman if she had ever been the subject of a bankruptcy petition or ever been found liable in either: (a) an arbitration; or (b) a civil, self-regulatory organization, or administrative proceeding. As none of these apply to Leslie Grossman, TrustFirst Inc. has no information to disclose in this regard.

# Trendz Advisors, Inc. ADV, Part II Brochure Supplement

## James Anthony Powers

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TrustFirst, Inc.  
265 Brookview Centre Way, Suite 504  
Knoxville, TN 37919  
CRD# 2832074  
Registered with this firm since: March 2010

## PURPOSE OF THE BROCHURE SUPPLEMENT

This *BROCHURE SUPPLEMENT* provides information about James Anthony Powers that supplements the TrustFirst, Inc. Form ADV Part II. You should have received a copy of the Form ADV Part II with your Investment Advisory Agreement. Please contact James Anthony Powers if you did not receive Form ADV Part II or if you have any questions about the contents of this *BROCHURE SUPPLEMENT*. Additional information about James Anthony Powers is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) (the CRD number for James Anthony Powers is 2832074).

**NOTE:** While TrustFirst, Inc. may refer to itself as a "registered investment advisor" or "RIA," Clients should be aware that registration itself does not imply any level or skill or training.

## EDUCATIONAL AND BUSINESS EXPERIENCE

### *Education*

University of the Cumberlands, Bachelor of Science Degree

### *Business Background*

TrustFirst Inc., registered representative and investment advisor representative, 2010-present

James A. Powers Registered Investment Advisor, 2003 - 2012

Securities Service Network, registered representative, 2001-2010

Investment Exams: S7 General Securities Exam, S63 State, and S65 Uniform Investment

Advisor State Law Examination

## DISCIPLINARY INFORMATION

James Anthony Powers has no current or past disciplinary actions. Prospective clients can view the CRD records (registration records) for James Anthony Powers through FINRA's BrokerCheck database online at [www.finra.org/brokercheck](http://www.finra.org/brokercheck). The CRD number for James Anthony Powers is 2832074. For any pending regulatory actions, see sites listed above.

## **OTHER BUSINESS ACTIVITIES**

In addition to being a registered investment adviser representative (hereafter “RIA Rep”) of TrustFirst, Inc., James Anthony Powers is licensed as an independent insurance agent in Tennessee. James Anthony Powers, as an IA Rep of TrustFirst Inc., may make recommendations on insurance products and may also, as an independent insurance agent, sell those recommended insurance products to advisory clients. When such recommendations or sales are made, a conflict of interest exists as James Anthony Powers may earn insurance commissions for the sale of those products, which may create an incentive to recommend such products. TrustFirst, Inc. requires that James Anthony Powers disclose this conflict of interest when such recommendations are made.

## **ADDITIONAL COMPENSATION**

Aside from the sales commissions paid by insurance companies to James Anthony Powers (see the “OTHER BUSINESS ACTIVITIES” section above), James Anthony Powers does not receive any additional compensation from non-clients for providing advisory services. All advisory compensation is paid by clients directly.

## **SUPERVISION**

James Anthony Powers is supervised by Donald O. Taylor, Principal of TrustFirst, Inc.

## **REQUIREMENTS FOR STATE-REGISTERED ADVISERS**

TrustFirst, Inc. would be required to disclose additional information for James Anthony Powers if he had ever been the subject of a bankruptcy petition or ever been found liable in either: (a) an arbitration; or (b) a civil, self-regulatory organization or administrative proceeding. As none of these apply to James Anthony Powers, TrustFirst, Inc. has no information to disclose in this regard.