Chad Brandon Bushon

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Disclosure Brochure Supplement
Part 2B, Form ADV

September 1, 2026

This brochure supplement provides information about Chad Brandon Bushon and supplements the SPG Advisors LLC's brochure. You should have received a copy of that brochure. Please contact Chad Brandon Bushon if you did not receive the brochure or if you have any questions about the contents of this supplement.

Additional information about Chad Brandon Bushon (CRD #6186251) is available on the SEC's website at www.adviserinfo.sec.gov.

Brochure Supplement (Part 2B of Form ADV)

Supervised Person Brochure
Chad Brandon Bushon
Year of birth: 1971

Item 2 Educational Background and Business Experience

Educational Background:

- Arizona State University, Bachelor of Science in Criminal Justice; 1995

Business Experience:

- SPG Advisors, LLC; Investment Advisor Representative; 05/2025 - Present
- Joslin Capital Advisors, LLC; Registered Representative/Investment Adviser Representative; 02/2023 – 03/2023
- Charles Schwab and Co., Inc.; Registered Representative/Investment Adviser Representative; 12/2022 – 02/2023
- TD Ameritrade, Inc.; Investment Consultant; 11/2015 – 12/2022
- LPL Financial, LLC; Registered Representative; 09/2014 – 11/2015

Professional Designations:

- Certified Financial Planner™ (CFP®)[1]
- Accredited Wealth Management Advisor™ (AWMA®)[2]
- Chartered Retirement Planning Counselor™ (CRPC®)[3]

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[1] 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 or higher 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 requirements 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 Commitment -** Individuals need to comply with the 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.

[2] To obtain the AWMA® designation, the following requirements set by the College for Financial Planning®:

- Complete the Educational Program

The AWMA® program covers key topics such as estate planning, tax strategies, retirement planning, investment management, and wealth transfer for high-net-worth individuals.
The course is self-paced and typically completed within 9 to 11 weeks.

- Pass the Final Examination

Candidates must pass a proctored final exam within 120 days of enrolling in the program.
A minimum passing score (typically 70%) is required.

- Professional Experience (Recommended)

While not mandatory, prior experience in financial services, wealth management, or financial advising is strongly recommended.
Adhere to the Code of Ethics
Candidates must agree to abide by a Code of Ethics and professional conduct as outlined by the College for Financial Planning®.
Continuing Education Requirements
To maintain the designation, designees must complete 16 hours of continuing education every two years, and comply with an annual renewal process, which includes payment of a renewal fee and affirmation of ethical standards.

[3] To obtain the CRPC® designation, the following requirements as set by the College for Financial Planning®:

- Complete the Educational Program

The CRPC® program focuses on retirement planning strategies, including retirement income management, Social Security and Medicare planning, asset management, and estate considerations.

Item 3 Disciplinary Information

Criminal or Civil Action: None to report
Administrative Proceeding: None to report
Self-Regulatory Proceeding: None to report

Item 4 - Other Business Activities

None to report.

Item 5 - Additional Compensation

None to report.

Item 6 - Supervision

Supervision of Chad Brandon Bushon is performed by Andrew Lucich in his capacity as Chief Compliance Officer of SPG Advisors. SPG Advisors has implemented a policies and procedures manual and Code of Ethics which guides the Firm and its supervised persons in meeting their fiduciary obligations to clients when providing investment advisory services. As SPG Advisors' Chief Compliance Officer, Mr. Lucich is responsible for the implementation of the Firm's policies and procedures and Code of Ethics. Mr. Lucich may be contacted at 781-307-1747 for more information about this Brochure Supplement.

The program is self-paced and typically completed in 6 to 10 weeks.

- Pass the Final Examination

Candidates must successfully pass a timed, proctored final exam within 120 days of enrollment.
A minimum score of 70% is required to pass.

- Professional Experience (Recommended)

While not required, experience in retirement or financial planning is recommended to enhance understanding and application of the material.

- Adhere to the Code of Ethics

Candidates must commit to and follow a Code of Ethics and professional conduct as defined by the College for Financial Planning®.

- Continuing Education Requirements

Designees must complete 16 hours of continuing education every two years to maintain the credential.
An annual renewal, including an ethics affirmation and renewal fee, is also required to keep the designation in good standing.