Tyler Lively

Disclosure Brochure Supplement
Part 2B, Form ADV

SPG Advisors LLC

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

Additional information about Tyler Lively (CRD# 6487814) is available on the SEC's website at www.adviserinfo.sec.gov.

Brochure Supplement (Part 2B of Form ADV)

Tyler Lively
Year of Birth: 1989

Item 2 Educational Background and Business Experience

Educational Background:

- Brigham Young University, Bachelor of Science, Business Management - Entrepreneurship; 2013

Business Experience:

- SPG Advisors LLC; Director of Financial Planning, Investment Advisor Representative; 06/2023 - Present
- Sound Planning Group, Inc; Insurance Agent; 06/2023 to Present
- The Retirement Solution, Inc; Investment Advisor Representative, Insurance Agent; 08/2015 to 05/2023
- The Retirement Income Solutions, Inc; Insurance Agent; 08/2015 - 12/2017
- National Security Agency; Business Manager; 07/2013 - 07/2015

Professional Designations:

- 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"). The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the 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 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 requirement through other qualifying credentials. CFP Board implemented the bachelor's degree or higher requirement in 2007 and the financial planning development capstone course requirement in March 2012. Therefore, a CFP® professional who first became certified before those dates may not have earned a bachelor's or higher degree or completed a financial planning development capstone course.
- 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 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.

- A CFP is a certified financial planner that has a proficiency in risk management, investment, tax, retirement, income and estate planning. They can provide comprehensive services across a broad spectrum of financial planning concerns. The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at www.CFP.net

- Chartered Retirement Planning Counselor™ (CRPC®)
  The Chartered Retirement Planning Counselor™ (CRPC®) designation is awarded by the College for Financial Planning. To obtain the designation, individuals must complete a course of study focused on retirement planning topics and successfully pass a final examination. Designees must also satisfy applicable continuing education and renewal requirements to maintain the designation.

- Accredited Behavioral Finance Professional™ (ABFP®)
  The Accredited Behavioral Finance Professional™ (ABFP®) designation is awarded by the College for Financial Planning. To obtain the designation, individuals must complete a course of study focused on behavioral finance principles and their application to financial planning and successfully pass a final examination. Designees must also satisfy applicable continuing education and renewal requirements to maintain the designation.

- Registered Investment Advisor Representative (IAR)

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

Tyler Lively is an insurance agent (License #902083) with Sound Planning Group, Inc and spends less than 30% of his time in this capacity. From time to time, he may offer clients products and/or services from these activities.

This practice presents a conflict of interest because it gives an incentive to recommend products and services based on the commission received. This conflict is mitigated by disclosures, procedures, and the firm's fiduciary obligation to place the client's best interest first. The clients are informed that the advisor representative receives a commission on the sale of an insurance product that is paid directly by the insurance company and not from the client's insurance assets. The clients are not required to purchase any products or services. Clients have the option to purchase these products or services through the insurance agent or agency of their choosing, including those unaffiliated with SPG Advisors LLC and Sound Planning Group, Inc.

Item 5 - Additional Compensation

Tyler Lively may receive additional compensation in his capacity as an insurance agent but he does not receive any performance based fees. He does not receive any additional compensation for performing advisory services other than what is disclosed in Item 5 of Part 2A.

Item 6 - Supervision

Supervision of Tyler Lively 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.