

Investment Advisory Representative Brochure (“ADV Part 2B”)

Leiland David Overson

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Mesa, Arizona 85209
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CRD #: 1253784

Synergy Investment Group, LLC

2622 Dale Earnhardt Boulevard
Kannapolis, North Carolina 28083
(704) 333-7637
IARD #: 46035

September 6, 2012

This Brochure Supplement provides information about Leiland David Overson (“Supervised Person”) that supplements the Synergy Investment Group, LLC Brochure. You should have received a copy of that Brochure. Please contact Joseph Hayes, Chief Compliance Officer, if you did not receive Synergy Investment Group, LLC’s Brochure or if you have any questions about the contents of this supplement.

Additional information about Leiland David Overson is available on the SEC’s website at www.adviserinfo.sec.gov.

Item 2- Educational Background and Business Experience

Year of Birth

1954

Education

Mesa Community College, Attended off and on from 8/72 to 8/78, No degree conferred

Brigham Young University, Attended 8/75 to 12/75, No degree conferred

In October 1991, he earned the professional designation of Chartered Financial Consultant ("ChFC") from the American College. The minimum requirements for receiving such a designation is three years of professional experience within the prior five years of awarding the designation and the completion of six core and two elective courses. On an ongoing basis, an individual with the ChFC must complete 30 hours of continuing education credits every two years.

Business Experience

Sterne, Agee Financial Services, Inc., Registered Representative, 02/2012-Present

Synergy Investment Group, LLC, Representative, 06/2008-Present

First Allied Securities, Inc., Registered Representative, 05/2008-06/2008

First Advisors, Inc., Investment Advisor Representative, 01/2007-06/2008

FFP Securities, Inc., Registered Representative, 03/2006-05/2008

FFP Advisory Services, Inc., Investment Advisor Representative, 03/2006-01/2007

Raymond James Financial Services, Inc., Financial Advisor, 05/2005-03/2006

FFP Securities, Inc., Registered Representative, 01/1996-05/2005

Sun Investment Services, Inc., Registered Representative, 06/1991-12/1995

W.S. Griffith & Company, Inc., Registered Representative, 02/1984-05/1991

Home Life, Agent, 02/1984-02/1991

Item 3- Disciplinary History

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. No information is applicable to this Item.

Item 4- Other Business Activities

The Supervised Person, in addition to providing investment advisory and/or financial planning services, is also registered as a broker/dealer agent of Sterne, Agee Financial Services, Inc. offering various securities products to clients. For advisory clients participating in the Managed Account Program, the Supervised Person may be entitled to a portion of commissions as a broker/dealer agent. The receipt of commissions represents a conflict of interest. This conflict is discussed in Items 5 and 12 of the ADV Part 2A.

For non-advisory assets, the Supervised Person, as a broker/dealer agent, does receive commissions from the sale of various securities products. In the case of mutual funds, the Supervised Person may also receive trails, in the form of 12b-1 fees, for existing mutual fund positions. Since the Supervised Person receives commission for the sale of securities products, there is an incentive for the Supervised Person to recommend products based on compensation received rather than the client's needs. The firm has adopted policies and practices designed to review transactions for suitability and their overall appropriateness to the client.

Under the doing business as name of Overson Tax Advisory, Inc., the Supervised Person is engaged in tax preparation and insurance sales in addition to providing investment and advisory solutions. The Supervised Person receives commissions for insurance transactions. Since the Supervised Person receives commission for the sale of insurance products, there is an incentive to recommend products based on compensation received rather than the client's needs. The firm has adopted a set of policies and practices requiring the Supervised Person to conduct such activity consistent with standards of commercial honor and principles of trade and that such activity must be consistent with the client's needs.

Item 5- Additional Compensation

The Supervised Person does not receive economic benefits in the form of awards, bonuses and prizes for any person or entity for providing advisory services and investment advice to a client of Synergy Investment Group, LLC.

Item 6 - Supervision

Joseph Hayes, Chief Compliance Officer, and any designee he may appoint are daily reviewing transactions in Client accounts. A sample of accounts is monitored by the Chief Compliance Officer. In such a review, the Chief Compliance Officer is evaluating transaction history relative to the Client's profile and the underlying agent's compliance with firm policies and fiduciary standards. Additional account reviews may be triggered by a specific client request; a customer complaint; or, as needed, based on activity levels within an account. A sample of financial plans will be reviewed as needed by the Chief Compliance Officer. Joseph Hayes can be contacted at (704) 333-7637.

Item 7- Requirements for State-Registered Advisers

Registered investment advisers are required to disclose all material facts regarding any reportable events that would be material to your evaluation of each supervised person providing investment advice. There is no information to report for this Item.