

# Brochure Supplement

**Jody P. Medford**

101 W. Big Beaver Road, Suite 1400  
Troy, MI 48084

(248) 687-1110

[www.lineguardinvestments.com](http://www.lineguardinvestments.com)

This brochure supplement provides information about Jody P. Medford that supplements the brochure of LineGuard Investments, LLC (herein after "LineGuard"), a copy of which you should have received. Please contact our Chief Compliance Officer if you did not receive LineGuard Investments, LLC's brochure or if you have any questions about the contents of this supplement. Additional information about Jody P. Medford is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

**LineGuard Investments, LLC, a Registered Investment Adviser**

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## Item 2. Educational Background and Business Experience

Born 1972

### *Post-Secondary Education:*

Central Michigan University – 1995, Bachelor of Science, Finance

### *Recent Business Background:*

LineGuard Investments, LLC, Managing Member, May 2011 – Present

Tactical Allocation Group, Financial Consultant, April 2009 – May 2011

Fidelity Brokerage Services, Inc., Account Executive, April 1998 – April 2009

### *Professional Designations:*

Jody P. Medford is a CERTIFIED FINANCIAL PLANNER™ professional (“CFP®”). The CFP®, CERTIFIED FINANCIAL PLANNER™ and certification marks are financial planning credentials awarded by Certified Financial Planner Board of Standards Inc. (“CFP Board”) to individuals who meet its education, examination, work experience, and ethics requirements. Eligible candidates must have at least a bachelor's degree (or its equivalent) in any discipline from an accredited college or university in order to obtain a CFP® certification. The candidate also must pass an examination, have three years of personal financial planning experience, and meet the CFP Board's ethical requirements. To maintain the certification, the CFP Board requires individuals to complete 30 hours of continuing education hours every two years and renew an agreement to be bound by its Standards of Professional Conduct.

## Item 3. Disciplinary Information

LineGuard is required to disclose the facts of any legal or disciplinary events that are material to a client's evaluation of Jody P. Medford. LineGuard does not have any required disclosures to this Item.

## Item 4. Other Business Activities

LineGuard is required to disclose if Jody P. Medford is engaged in any investment-related business or occupation, including whether the relationship creates a material conflict of interest or if Jody P. Medford receives compensation from the sale of securities products. LineGuard is also required to disclose if Jody P. Medford is actively engaged in any other business that provides a substantial source of Jody P. Medford's income or involves a substantial amount of his time. LineGuard does not have any required disclosures to this Item.

## Item 5. Additional Compensation

LineGuard is required to disclose if Jody P. Medford receives an economic benefit outside of his regular compensation (i.e., salary plus regular bonus) for providing advisory services (e.g. additional bonus for referrals). LineGuard has no disclosures related to this Item.

## Item 6. Supervision

Jeffrey Kercorian is responsible for supervising Jody P. Medford's advisory activities on behalf of LineGuard. Jeffrey Kercorian's phone number is (248) 687-1110.

LineGuard supervises its personnel and the investments made in client accounts. LineGuard monitors the investments recommended by Jody P. Medford to ensure those investments are suitable for the particular client and consistent with their investment needs, goals, objectives and risk tolerance as well as any restrictions requested by the client.

LineGuard periodically reviews the advisory activities of Jody P. Medford, which may include reviewing individual client accounts and correspondence (including emails) sent to and received by Jody P. Medford.

## Item 7. Requirements for State-Registered Advisers

Jody P. Medford has never been the subject of a bankruptcy petition nor has he ever been involved in any of the following events:

1. An award or otherwise being found liable in an arbitration claim alleging damages in excess of \$2,500, involving any of the following:
  - (a) an investment or an investment-related business or activity;
  - (b) fraud, false statement(s), or omissions;
  - (c) theft, embezzlement, or other wrongful taking of property;
  - (d) bribery, forgery, counterfeiting, or extortion; or
  - (e) dishonest, unfair, or unethical practices.
2. An award or otherwise being found liable in a civil, self-regulatory organization, or administrative proceeding involving any of the following:
  - (a) an investment or an investment-related business or activity;
  - (b) fraud, false statement(s), or omissions;
  - (c) theft, embezzlement, or other wrongful taking of property;
  - (d) bribery, forgery, counterfeiting, or extortion; or
  - (e) dishonest, unfair, or unethical practices.