

**LYNN RAYMOND SIEWERT**

**FIRM SUPPLEMENTAL BROCHURE**  
**(ADV - PART 2B)**

**MARCH 30, 2019**

*Epic Trust Investment Advisors, LLC*  
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This Supplemental Brochure provides information about Lynn Siewert that supplements the Firm Brochure for Epic Trust Investment Advisors, LLC. You should have received a copy of the Firm Brochure. Please contact Mr. Siewert at (360) 750-9626 if you did not receive the Adviser's Firm Brochure or if you have questions about the contents of this supplement.

Additional information about Lynn Siewert is available on the Securities Exchange Commission's (SEC's) website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov). You can search this site by a unique identifying number, known as a CRD number. The CRD number for Mr. Siewert is 1057367.

## ITEM 2 – EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

**Lynn Raymond Siewert**

**Born:** 1944

**Education:**

**University of Washington**, *Bachelor of Arts: Double major in Business Administration and Political Science, 1968*

**Financial Advisor Certification:**

**Series 63** *Uniform Securities Agent State Law Examination (NASAA)*

State Securities Law | August 13, 1982 [Passed]

**Series 65** *Uniform Investment Adviser Law Examination (NASAA)*

State Securities Law, June 9, 1992 [Passed]

**Series 7** *General Securities Representative Examination*

General Industry/Product | July 17, 1982 [Passed—Not Active]

**Series 8** *General Securities Sales Supervisor Examination (Options Module & General Module)*

Exam Type Unknown | January 7, 1985 [Passed—Not Active]

**Business Background:**

**Epic Trust Investment Advisors, LLC** – February 2018 to Present

– Wealth Management Advisor | Investment Adviser Representative

**Northwest Insurance Alliance** – February 2018 to Present

– Life and Disability Insurance Agent

**Advance Corporate Planning, LLC** – May 2017 to Present

– Branch Manager/Pension Consultant/Founder

**First Allied Advisory Services, Inc** – July 2012 to July 2017

– Investment Advisor Representative

**First Allied Advisory Securities, Inc** – December 2006 to July 2017

– Registered Representative

**First Allied Advisory Securities, Inc** – December 2006 to July 2017

– IAR

## ITEM 3 – DISCIPLINARY HISTORY

Registered Investment Advisor Representatives are required to disclose all material facts regarding legal or disciplinary events that might affect your evaluation of supervised persons providing investment advice. No required disclosable information applies to this Item.

#### **ITEM 4 – OTHER BUSINESS ACTIVITIES**

Mr. Siewert is a licensed Independent Life Insurance Agent. He spends approximately 5 hours per month on these services through Northwest Insurance Alliance, LLC and may recommend these services to clients. This may be considered a conflict of interest, as commissions may give Mr. Siewert a financial incentive to recommend and sell insurance products to clients. Mr. Siewert attempts to mitigate any possible conflicts of interest for clients by informing clients they are not obligated to purchase insurance products through his insurance agency.

Mr. Siewert is Owner and Manager of His Eagle Nest, LLC. The nature of the business is Real Estate Rental Properties, a non-investment related business. He spends approximately 12 hours per month on these services which began in September 1, 2017. The number of hours devoted to this business during securities trading hours are none. Mr. Siewert is not allowed to participate in Real Estate transactions with Clients.

#### **ITEM 5 – ADDITIONAL COMPENSATION**

As disclosed above in Item 4, Mr. Siewert is a licensed Independent Life and Annuity Insurance Agent and he receives commissions for the sale of insurance products. Mr. Siewert does not receive any compensation in addition to that disclosed in Adviser's ADV - Part 2A.

#### **ITEM 6 – SUPERVISION**

Mr. Siewert is supervised by Jeffery Lewis, the firm's Owner. Mr. Lewis can be reached at (509) 591-0014. Mr. Lewis reviews all new accounts opened by Mr. Siewert.

#### **ITEM 7 - REQUIREMENTS FOR STATE-REGISTERED ADVISERS**

##### **A. Arbitration, Civil, Self-Regulatory Organization or Administrative Proceedings**

Mr. Siewert has not been the subject of any arbitration claim, or the subject of any civil, self-regulatory organization or administrative proceeding in the past 10 years.

##### **B. Bankruptcy History**

Mr. Siewert has not been subject of a bankruptcy petition.