

Item 1- Cover Page



Investment Advisor Representative Brochure ("ADV Part 2B")

Jason P. Daugherty
Triumph Wealth Advisors, Inc.
IARD #: 153175

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This brochure supplement provides information about Jason P. Daugherty that supplements the Triumph Wealth Advisors, Inc. brochure. You should have received a copy of that brochure. Please email compliance at compliance@triumphwealthadvisors.com or call toll free at 877-924-9322 if you did not receive Triumph Wealth Advisors' brochure or if you have any questions about the contents of this supplement.

Item 2 - Educational Background and Business Experience

Year of Birth:

1974

Education Background

Jason Daugherty attended the University of Georgia majoring in biochemistry in pilot program with the Medical College of Georgia. After his injury, Mr. Daugherty studied finance at Kennesaw State University.

Mr. Daugherty is currently a Registered Representative with World Equity Group since 2021 and an Investment Advisor Representative with Triumph Wealth Advisers since he founded TWA in 2010. He has been securities licensed since 1999. Jason started as a Financial Advisor with Ty J. Young & Associates from 1998-2003. In July of 2003 Jason was involved in a near fatal auto accident that left him a quadriplegic. After 3 1/2 years of recovery and rehab Mr. Daugherty bought a mortgage company he helped start prior to his accident. registered with TCM Securities and remained a registered representative until it closed in 2019.

Item 3 - Disciplinary Information

Jason does not have any disciplinary actions to report.

Item 4 - Other Business Activities

Mr. Daugherty, in addition to serving as an investment advisory representative, is a broker/dealer representative of World Equity Group offering various securities products and is an insurance agent offering fixed annuities, life insurance, long term care insurance and indexed annuities. For non-advisory business, Mr. Daugherty receives a commission on any securities or insurance products he may sell to a client.

These practices represent conflicts of interest because it gives Mr. Daugherty an incentive to recommend products based on the commission amount received. This conflict is mitigated by the fact that Mr. Daugherty and TWA have a fiduciary responsibility to the client. At all times they are to place the best interest of the client first. To help relieve any conflict, the client is in no way required to

purchase any product. Clients have the option to purchase these products through another insurance agent or broker dealer of their choosing.

Item 5 - Additional Compensation

Jason 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 Triumph Wealth Advisors, Inc.

Item 6 - Supervision

All advisors are required to submit new account applications prior to opening for compliance and suitability review. Any 3rd party management agreements must be reviewed and approved and client funds can only be placed with approved companies. Each independent contractor's office is reviewed and audited either on a one or three-year cycle depending on producer volume, types of business, and any complaints. Currently this office is reviewed every three-years.