

*This brochure supplement provides information about Gregory Lee Luken that supplements the Luken Investment Analytics, LLC brochure. You should have received a copy of that brochure. Please contact Gregory Lee Luken if you did not receive Luken Investment Analytics, LLC's brochure or if you have any questions about the contents of this supplement.*

*Additional information about Gregory Lee Luken is also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).*

**Luken Investment Analytics, LLC**  
Form ADV Part 2B – Individual Disclosure Brochure  
*for*

**Gregory Lee Luken**  
Personal CRD Number: 1860579  
Investment Advisor Representative

Luken Investment Analytics, LLC  
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Brentwood, TN 37027  
(615) 550-5570  
[greg@lukenanalytics.com](mailto:greg@lukenanalytics.com)

UPDATED: 3/27/2024

## Item 2: Educational Background and Business Experience

**Name:** Gregory Lee Luken **Born:** 1962

### Educational Background and Professional Designations:

#### Education:

Bachelor of Arts, English, Baylor University - 1987

#### Business Background:

05/2013 - Present	Investment Advisor Representative & President Luken Investment Analytics, LLC
05/2003-10-2017	Registered Representative/IAR SII Investments, Inc.
11/1999- 12/2003	President Luken Investment Group, Inc.

Gregory Lee Luken is also licensed insurance producer and agent.

## Item 3: Disciplinary Information

There is no disciplinary information to report.

## Item 4: Other Business Activities

Gregory Lee Luken is President of Luken Investment Analytics and a licensed insurance agent. From time to time, he will offer clients advice or products from this activity. Clients should be aware that insurance products may pay a commission and could involve a possible conflict of interest, as commissionable products can conflict with the fiduciary duties of a registered investment advisor. Luken Investment Analytics, LLC always acts in the best interest of the client; including in the sale of commissionable insurance products to advisory clients. Clients are in no

way required to implement the plan or purchase any insurance product through any representative of Luken Investment Analytics, LLC.

Mr. Luken acts as Trustee for his nephew's Trust account. He is not compensated for his duties in this capacity.

Mr. Luken owns rental property and receives rental payments in this capacity.

### **Item 5: Additional Compensation**

Other than regular compensation through Luken Investment Analytics, Gregory Lee Luken does not receive any economic benefit from any person, company, or organization, in exchange for providing clients advisory services through Luken Investment Analytics, LLC.

### **Item 6: Supervision**

Gregory Lee Luken is supervised by Carri Sanford, CCO. She reviews all client contracts and oversees the compliance for the advisory activities of the firm. Carri Sanford can be reached at the address and phone number on the cover page of this disclosure document or by emailing [carri@lukenanalytics.com](mailto:carri@lukenanalytics.com)

### **Item 7: Requirements For State Registered Advisors**

This disclosure is not required of SEC registered investment advisers.