

**LORI A. SELBY**

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

**MARCH 30, 2019**

*Epic Trust Investment Advisors, LLC  
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This Supplemental Brochure provides information about Lori Selby that supplements the Firm Brochure for Epic Trust Investment Advisors, LLC. You should have received a copy of the Firm Brochure. Please contact Ms. Selby at (509) 591-0014 if you did not receive the Adviser's Firm Brochure or if you have questions about the contents of this supplement.

Additional information about Lori Selby 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 Ms. Selby is 6332040.

## ITEM 2 – EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

**Lori A. Selby**

**Born:** 1961

### **Education:**

*Washington State University* – PhD in Higher Education– 2001

*Eastern Washington University* – Masters in Education – 1991

*Eastern Washington University* – Bachelors of Education/Physical Ed – 1983

*Spokane Falls Community College* – Associates of Arts – 1981

*Chartered Mutual Fund Counselor, CMFC®* - 2015

Completed a course of study encompassing all aspects of mutual funds and their uses as investment vehicles. The program is designed for approximately 120-150 hours of self-study. The program is self-paced and must be completed within one year from enrollment.

### **Business Background:**

*Epic Trust Investment Advisors, LLC*– March 2017 to Present  
– Vice President/Investment Adviser Representative

*Team Elite Networking* – May 2016 to Present  
– Vice President

*Laselby, LLC* – December 2014 to March 2017  
– Member Manager – Financial Advisor

*W&R Insurance Agencies* – July 2014 to March 2017  
– Insurance Agent

*Waddell & Reed, Inc* – May 2014 to March 2017  
– Associated Person

*Women Helping Women Fund Tri-Cities* – December 2015 to November 2016  
– Member of the Board

*Washington State University* – August 2007 to May 2014  
– Vice Chancellor of Finance / Director of Education

## ITEM 3 – DISCIPLINARY HISTORY

Registered investment advisers 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

Ms. Selby is a licensed insurance agent (Life, Disability & Variable Life). She may recommend these services to clients through Epic Trust Investment Advisors, LLC. This may be considered a conflict of interest, as commissions may give Ms. Selby a financial incentive to recommend and sell insurance products to clients. By her professional fiduciary duty to, and by informing clients

they are not obligated to purchase insurance products through her, Ms. Selby attempts to mitigate any possible conflicts of interest for clients.

Ms. Selby is a mentor for a non-profit company Soroptimist. She spends approximately 4 hours per month on this activity. This activity is not investment related

Ms. Selby is also a sole proprietor as a distributor for Advocare. She spends approximately 4 hours per month on this activity. This activity is not investment related.

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

Ms. Selby does not receive any compensation in addition to that disclosed in Adviser's ADV - Part 2A.

#### **ITEM 6 – SUPERVISION**

Ms. Selby 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 Ms. Crane.

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

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

Mr. Selby has not been the subject of any arbitration claim, or the subject of any civil, self-regulatory organization or administrative proceeding.

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

Ms. Selby has not been subject of a bankruptcy petition.