

LORI A. SELBY

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

OCTOBER 28, 2019

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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. 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:

Certified Financial Planner™, CFP® – 2019

Issued By: Certified Financial Planner Board Of Standards, Inc.

Prerequisites/Experience Required: Candidate must meet the following requirements: A Bachelor's degree (or higher) from an accredited college or university, and 3 years of full-time personal financial planning experience.

Educational Requirements: Candidate must complete a CFP-board registered program or hold one of the following: CPA; ChFC; Chartered Life Underwriter (CLU); CFA; Ph.D. in business or economics; Doctor of Business Administration; or Attorney's license.

Examination Type: CFP Certification Examination

Continuing Education: 30 hours every 2-years.

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.

Washington State University – PhD in Higher Education Administration– 2001

Eastern Washington University – Master's in Education – 1991

Eastern Washington University – Bachelor of Education/Physical Ed – 1983

Spokane Falls Community College – Associates of Arts – 1981

Business Background:

Epic Trust Investment Advisors, LLC– March 2017 to Present

– Vice President/Investment Adviser Representative

Northwest Insurance Alliance, LLC– March 2017 to Present

– Licensed Insurance Agent

Soroptimist – October 2015 to Present

– Mentor

Laselby, LLC – December 2014 to Present

– Member Manager/Financial Advisor

Team Elite Networking – May 2016 to April 2018

– Vice President

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. Ms. Selby has not been involved any of the following: a criminal or civil action in a domestic, foreign or military court of competent jurisdiction, an administrative proceeding before the SEC, any other federal regulatory agency, any state regulatory agency, or any foreign financial regulatory authority, or a self-regulatory organization proceeding.

ITEM 4 – OTHER BUSINESS ACTIVITIES

Ms. Selby is a licensed insurance agent (Life, Disability & Variable Life) through Northwest Insurance Alliance, LLC. 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

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. Selby.

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.