

# Brochure Supplement

**Jeffrey Kercorian**

101 W. Big Beaver Road, Suite 1400  
Troy, MI 48084

(248) 687-1110

[www.lineguardinvestments.com](http://www.lineguardinvestments.com)

This brochure supplement provides information about Jeffrey Kercorian that supplements the brochure of LineGuard Investments, LLC (herein after "LineGuard"), a copy of which you should have received. Please contact our Chief Compliance Officer if you did not receive LineGuard Investments, LLC's brochure or if you have any questions about the contents of this supplement. Additional information about Jeffrey Kercorian is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

**LineGuard Investments, LLC, a Registered Investment Adviser**

101 W. Big Beaver Road, Suite 1400, Troy, MI 48084 | 248-687-1110

## Item 2. Educational Background and Business Experience

Born 1970

### *Post-Secondary Education:*

Walsh College – 1993, Bachelor in Business Administration, Finance

### *Recent Business Background:*

LineGuard Investments, LLC, Managing Member, May 2011 – Present

Tactical Allocation Group, Director of Financial Consulting, January 2008 – May 2011

Fidelity Investments, Account Executive, June 1998 – January 2008

## Item 3. Disciplinary Information

LineGuard is required to disclose the facts of any legal or disciplinary events that are material to a client's evaluation of Jeffrey Kercorian. LineGuard does not have any required disclosures to this Item.

## Item 4. Other Business Activities

LineGuard is required to disclose if Jeffrey Kercorian is engaged in any investment-related business or occupation, including whether the relationship creates a material conflict of interest or if Jeffrey Kercorian receives compensation from the sale of securities products. LineGuard is also required to disclose if Jeffrey Kercorian is actively engaged in any other business that provides a substantial source of Jeffrey Kercorian's income or involves a substantial amount of his time. LineGuard does not have any required disclosures to this Item.

## Item 5. Additional Compensation

LineGuard is required to disclose if Jeffrey Kercorian receives an economic benefit outside of his regular compensation (i.e., salary plus regular bonus) for providing advisory services (e.g. additional bonus for referrals). LineGuard has no disclosures related to this Item.

## Item 6. Supervision

Jody P. Medford is responsible for supervising Jeffrey Kercorian's advisory activities on behalf of LineGuard. Jody P. Medford's phone number is (248) 687-1110.

# LineGuard Investments, LLC Disclosure Brochure

LineGuard supervises its personnel and the investments made in client accounts. LineGuard monitors the investments recommended by Jeffrey Kercorian to ensure those investments are suitable for the particular client and consistent with their investment needs, goals, objectives and risk tolerance as well as any restrictions requested by the client.

LineGuard periodically reviews the advisory activities of Jeffrey Kercorian, which may include reviewing individual client accounts and correspondence (including emails) sent to and received by Jeffrey Kercorian.

## Item 7. Requirements for State-Registered Advisers

Jeffrey Kercorian has never been the subject of a bankruptcy petition nor has he ever been involved in any of the following events:

1. An award or otherwise being found liable in an arbitration claim alleging damages in excess of \$2,500, involving any of the following:
  - (a) an investment or an investment-related business or activity;
  - (b) fraud, false statement(s), or omissions;
  - (c) theft, embezzlement, or other wrongful taking of property;
  - (d) bribery, forgery, counterfeiting, or extortion; or
  - (e) dishonest, unfair, or unethical practices.
2. An award or otherwise being found liable in a civil, self-regulatory organization, or administrative proceeding involving any of the following:
  - (a) an investment or an investment-related business or activity;
  - (b) fraud, false statement(s), or omissions;
  - (c) theft, embezzlement, or other wrongful taking of property;
  - (d) bribery, forgery, counterfeiting, or extortion; or
  - (e) dishonest, unfair, or unethical practices.