

**LORI A. SELBY**

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

**MAY 24, 2018**

*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 Administration – 2001

*Eastern Washington University* – Master of Education – 1991

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

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

**Financial Advisor Certification:**

*Series 7 General Securities Representative Examination*

General Industry/Product | August 21, 2014 [Passed]

*Series 66 Uniform Combined State Law Examination*

State Securities Law, October 8, 2014 [Passed]

**Chartered Mutual Fund Counselor, CMFC® - 2015**

Issued by: College for Financial Planning

Education Requirement: Completed a course of study encompassing all aspects of mutual funds. The program is designed for approximately 120-180 hours of self-study.

Examination Type: Proctored Final Exam

Continuing Education/Experience Requirements: 16 hours every 2 years

**Business Background:**

*Epic Trust Investment Advisors, LLC* – March 2017 to Present

– Vice President | Investment Adviser Representative

*Northwest Insurance Alliance* – March 2017 to Present

– Life and Disability Insurance Agent

*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 Advisors 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 Life, Disability & Variable Life Insurance Agent, spending approximately 10 hours per week on this activity. She may recommend these services to clients through Northwest Insurance Alliance, 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. Ms. Selby attempts to mitigate any possible conflicts of interest for clients by informing clients they are not obligated to purchase insurance products through her insurance agency.

Ms. Selby is a member of Soroptimist, a local non-profit company. She spends approximately 2 hours per month on this activity. This activity is non-investment related.

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

Ms. Selby does not receive any compensation in addition to that disclosed in Advisor'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.