

Supplement to
Part 2A of Form ADV

9/30/2023

Martha Stubblefield Mason Biographical Information

Martha Mason, born in 1959, currently serves as President of Taylor Securities, Inc. She obtained a Bachelor of Science degree in Business in 1981 and joined Taylor Financial Corporation in 1982. She first became registered in the securities industry in 1994 and currently has the following registrations: Uniform Securities Agent State Law Series 63, Investment Company and Variable Contracts Representative Series 6, Financial Operations Principal Series 28, Operations Professional Series 99, and Investment Advisor registration. She also serves as President and Chief Operating Officer for Taylor Financial Corporation and Taylor-Webster, Inc., as well as Taylor Securities, Inc.

Disciplinary Information

Ms. Mason has not been involved in any legal or disciplinary events that would be material to a client's evaluation of Ms. Mason or of Taylor Securities, Inc.

Other Business Activities

Ms. Mason is not engaged in any other investment related business outside of Taylor Securities, Inc. However, she continues to work for and is a minority shareholder of Taylor Financial Corporation and Taylor-Webster, Inc., in addition to Taylor Securities, Inc.

Additional Compensation

In connection to providing investment advice to clients, Ms. Mason does not receive economic benefits from any person or entity other than Taylor Securities, Inc. and the two affiliated corporations name above.

Supervision

Ms. Mason is a member of the investment advisory committee, which evaluates the current market conditions, researches the various investment options, and makes recommendations appropriate to individual clients. Her recommendations and investment activities are overseen by the firm's Chief Compliance Officer, George W. Moody, who is also a member of the investment advisory committee.

David A. Lankford Biographical Information

David Lankford, born in 1955, currently serves as Vice President, an Investment Advisor and member of the investment advisory committee at Taylor Securities, Inc. He obtained a Bachelor of Science degree in Accounting in 1978. He first became registered in the securities industry in 1986 and currently has the following registrations: Uniform Securities Agent State Law Series 63, General Securities Representative Series 7, General Securities Principal Series 24, Operations Professional Series 99, and Investment Advisor registration. He also works as an insurance agent for Taylor Financial Corporation, an independent insurance agency, and on some occasions, he may represent Taylor-Webster, Inc, a retirement plan administration and consulting firm.

Disciplinary Information

Mr. Lankford has not been involved in any legal or disciplinary events that would be material to a client's evaluation of Mr. Lankford or of Taylor Securities, Inc.

Other Business Activities

Mr. Lankford is not engaged in any other investment related business outside of Taylor Securities, Inc. However, he may on occasion represent both Taylor Financial Corporation and Taylor-Webster, Inc.

Additional Compensation

In connection to providing investment advice to clients, Mr. Lankford does not receive economic benefits from any person or entity other than Taylor Securities, Inc. and the two affiliated corporations name above.

Supervision

Mr. Lankford is a member of the investment advisory committee, which evaluates the current market conditions, researches the various investment options, and makes recommendations appropriate to individual clients. His recommendations and investment activities are overseen by the firm's Chief Compliance Officer, George W. Moody, who is also a member of the investment advisory committee.

George W. Moody Biographical Information

George Moody, born in 1983, currently serves as General Securities Principal, Municipal Securities Principal, Financial Operations Principal, and Chief Compliance Officer of Taylor Securities, Inc. Mr. Moody obtained a Bachelor of Science degree in Finance from Auburn University in 2005. He first became registered in the securities industry in 2006 and joined Taylor Securities in 2011. He currently holds the following registrations: Uniform Securities Agent State Law and Investment Advisor Series 66, Investment Company and Variable Contracts Representative Series 6, General Securities Representative Series 7, General Securities Principal Series 24, Financial Operations Principal Series 28, Municipal Securities Principal Series 53, Operations Professional Series 99, and Options Principal Series 4.

Disciplinary Information

Mr. Moody has not been involved in any illegal or disciplinary events that would be material to a client's evaluation of Mr. Moody or of Taylor Securities, Inc.

Other Business Activities

Mr. Moody is not engaged in any other investment related business outside of Taylor Securities, Inc. However, he may on occasion represent both Taylor Financial Corporation and Taylor-Webster, Inc.

Additional Compensation

In connection to providing investment advice to clients, Mr. Moody does not receive economic benefits from any person or entity other than Taylor Securities, Inc. and the two affiliated corporations name above.

Supervision

Mr. Moody is a member of the management team at Taylor Securities, Inc., as well as a member of the investment advisory committee. As Chief Compliance Officer, General Securities Principal, Municipal Securities Principal, and Financial Operations Principal, he oversees the investment and other securities activities of the firm.

Holden M. Mobley Biographical Information

Holden Mobley, born in 1991, currently serves as a Registered Representative and Investment Advisor Representative at Taylor Securities, Inc. He obtained a Bachelor of Science degree in Philosophy from Belmont University in 2015, and his Doctorate of Law from the University of Kentucky College of Law in 2018. He first became registered in the securities industry in 2020 after practicing law for 2 years, and currently has the following registrations: Securities Industry Essentials Examination, Uniform Combined State Law Series 66, General Securities Representative Series 7, and Investment Advisor registration.

Disciplinary Information

Mr. Mobley has not been involved in any legal or disciplinary events that would be material to a client's evaluation of Mr. Mobley or of Taylor Securities, Inc.

Other Business Activities

Mr. Mobley is not engaged in any other investment related business outside of Taylor Securities, Inc.

Additional Compensation

In connection to providing investment advice to clients, Mr. Mobley does not receive economic benefits from any person or entity other than Taylor Securities, Inc.

Supervision

Mr. Mobley's activities are overseen by our Chief Compliance Officer, George W. Moody.