

Form ADV 2B Supplement

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KENNETH R. WOODS

Asset Preservation Advisors, LLC

3344 Peachtree Road, Suite 2050

Atlanta, GA 30326

(404) 261-1333

March 30, 2026

This Brochure Supplement provides information about KENNETH R. WOODS, which supplements the ASSET PRESERVATION ADVISORS, LLC Brochure. You should have received a copy of that Brochure. Please contact Tara Hart at 404-261-1333 if you did not receive ASSET PRESERVATION ADVISORS, LLC's Brochure or if you have any questions about the contents of this supplement.

Item 2- Educational Background and Business Experience

Kenneth R. Woods, *Chairman, Partner*

Year of Birth: 1942

Education:

Florida State University (B.S. – 1966)

Business Background:

Asset Preservation Advisors, LLC

Chairman, Partner, 2021 – Present

Chairman & CEO, Portfolio Manager, Partner, 1989 – 2021

Item 3- Disciplinary Information

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. No information is applicable to Mr. Woods.

Item 4- Other Business Activities

No reportable other business activities.

Item 5- Additional Compensation

No reportable additional compensation

Item 6 - Supervision

Mr. Woods is a principal of Asset Preservation Advisors, LLC. He can be reached at (404) 261-1333.

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CHARLES R. DOTY

Asset Preservation Advisors, LLC

3344 Peachtree Road, Suite 2050

Atlanta, GA 30326

(404) 261-1333

March 30, 2026

This Brochure Supplement provides information about CHARLES R. DOTY, which supplements the ASSET PRESERVATION ADVISORS, LLC Brochure. You should have received a copy of that Brochure. Please contact Tara Hart at 404-261-1333 if you did not receive ASSET PRESERVATION ADVISORS, LLC's Brochure or if you have any questions about the contents of this supplement.

Item 2- Educational Background and Business Experience

Charles R. Doty, *Co-Chief Executive Officer, Partner*

Year of Birth: 1960

Education:

University of Mississippi (B.B.A. – 1983)

Business Background:

Asset Preservation Advisors, LLC.

Co-CEO, Partner, 2023 - Present

Co-CEO, COO, Partner, 2021 – 2023

President / COO, Portfolio Manager, Partner, 2002 – 2021

Municipal Trade

COO and President, 1999 – 2002

SunTrust Capital Markets Inc.

Director of National Institutional Municipal Sales, 1983 – 1999

Item 3- Disciplinary Information

Registered investment advisers are required to disclose all material facts regarding any legal

or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. No information is applicable to Mr. Doty.

Item 4- Other Business Activities

No reportable other business activities.

Item 5- Additional Compensation

No reportable additional compensation.

Item 6 - Supervision

Mr. Doty is a principal of Asset Preservation Advisors, LLC. He can be reached at (404) 261-1333.

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KEVIN B. WOODS

Asset Preservation Advisors, LLC

3344 Peachtree Road, Suite 2050

Atlanta, GA 30326

(404) 261-1333

March 30, 2026

This Brochure Supplement provides information about KEVIN B. WOODS, which supplements the ASSET PRESERVATION ADVISORS, LLC Brochure. You should have received a copy of that Brochure. Please contact Tara Hart at 404-261-1333 if you did not receive ASSET PRESERVATION ADVISORS, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Kevin B. Woods is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2- Educational Background and Business Experience

Kevin B. Woods, *Co-Chief Executive Officer, Chief Investment Officer, Partner*

Year of Birth: 1979

Education:

University of Mississippi (Bachelor of Finance – 2002)

Business Background:

Asset Preservation Advisors Inc.

Co-CEO, CIO, Partner, 2021 – Present

Managing Partner / CIO / Portfolio Manager, Partner, 2002 – 2021

Item 3- Disciplinary Information

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. No information is applicable to Mr. Woods.

Item 4- Other Business Activities

No reportable other business activities.

Item 5- Additional Compensation

No reportable additional compensation.

Item 6 - Supervision

Mr. Woods is a principal of Asset Preservation Advisors, LLC. He can be reached at (404) 261-1333.

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OVADYA “OV” ARYEH
Asset Preservation Advisors, LLC

3344 Peachtree Road, Suite 2050

Atlanta, GA 30326

(404) 261-1333

March 30, 2026

This Brochure Supplement provides information about OVADYA ARYEH, which supplements the ASSET PRESERVATION ADVISORS, LLC Brochure. You should have received a copy of that Brochure. Please contact Tara Hart at 404-261-1333 if you did not receive ASSET PRESERVATION ADVISORS, LLC’s Brochure or if you have any questions about the contents of this supplement.

Item 2- Educational Background and Business Experience

Ovadya Aryeh, Managing Director, Portfolio Manager

Year of Birth: 1979

Education:

Yeshiva University (B.S. in Finance – 2002)

Business Background:

Asset Preservation Advisors, LLC

Managing Director, 2024 – Present

Portfolio Manager, 2024 – Present

Credit Suisse Asset Management

Director / Municipals Strategy Portfolio Manager, 2011 - 2024

Vice President / Municipals Strategy Portfolio Manager, 2010 – 2011

Goldman Sachs

Vice President, 2008 – 2010

Associate, 2006 – 2008

Analyst, 2002 – 2006

Item 3- Disciplinary Information

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. No information is applicable to Mr. Aryeh.

Item 4- Other Business Activities

No reportable other business activities.

Item 5- Additional Compensation

No reportable additional compensation.

Item 6 - Supervision

Mr. Aryeh is supervised by Kevin Woods who can be reached at (404) 261-1333.

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ERGEN BANJA

Asset Preservation Advisors, LLC

3344 Peachtree Road, Suite 2050

Atlanta, GA 30326

(404) 261-1333

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Item 2- Educational Background and Business Experience

Ergen Banja, *Analyst*

Year of Birth: 2003

Education:

NYU Stern School of Business (B.S. in Finance – 2025)

Business Background:

Asset Preservation Advisors, LLC
Analyst, 2025 – Present

Smith Affiliated Capital Corp.
Credit Analyst, 2024 – 2025

Item 3- Disciplinary Information

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. No information is applicable to Mr. Banja.

Item 4- Other Business Activities

No reportable other business activities.

Item 5- Additional Compensation

No reportable additional compensation.

Item 6 - Supervision

Mr. Banja is supervised by Lori Cohane who can be reached at (404) 261-1333.

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PEYTON BOGARD

Asset Preservation Advisors, LLC

3344 Peachtree Road, Suite 2050

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(404) 261-1333

March 30, 2026

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Item 2- Educational Background and Business Experience

Peyton Bogard, *Senior Associate*

Year of Birth: 1999

Education:

University of Maryland (B.B.A. in Finance, Supply Chain Management – 2021)

Business Background:

Asset Preservation Advisors, LLC

Senior Associate, 2026 - Present

Associate, 2021 - 2025

Item 3- Disciplinary Information

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. No information is applicable to Mr. Bogard.

Item 4- Other Business Activities

No reportable other business activities.

Item 5- Additional Compensation

No reportable additional compensation.

Item 6 - Supervision

Mr. Bogard is supervised by Wesley Williams who can be reached at (404) 261-1333.

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TRISHA BROUSSARD

Asset Preservation Advisors, LLC

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Atlanta, GA 30326

(404) 261-1333

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This Brochure Supplement provides information about TRISHA BROUSSARD, which supplements the ASSET PRESERVATION ADVISORS, LLC Brochure. You should have received a copy of that Brochure. Please contact Tara Hart at 404-261-1333 if you did not receive ASSET PRESERVATION ADVISORS, LLC's Brochure or if you have any questions about the contents of this supplement.

Item 2- Educational Background and Business Experience

Trisha Broussard, *Senior Vice President, Portfolio Manager*

Year of Birth: 1963

Education:

University of Southwest Louisiana (B.S. – 1985)

Business Background:

Asset Preservation Advisors, LLC

Senior Vice President / Portfolio Manager, 2006 – Present

Sterne Agee Leach

Senior VP of Municipal Trading, 2004 – 2005

Morgan Stanley

VP in Municipal Bond Department, 1986 – 2003

Item 3- Disciplinary Information

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. No information is applicable to Ms. Broussard.

Item 4- Other Business Activities

No reportable additional compensation.

Item 5- Additional Compensation

No reportable additional compensation.

Item 6 - Supervision

Ms. Broussard is supervised by Kevin Woods who can be reached at (404) 261-1333.

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KATELIN BUTKUS
Asset Preservation Advisors, LLC

3344 Peachtree Road, Suite 2050

Atlanta, GA 30326

(404) 261-1333

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Item 2- Educational Background and Business Experience

Katelin Butkus, *Director of Finance & Operations*

Year of Birth: 1989

Education:

Auburn University (B.S. in Business Administration – 2011)

Major: Finance, Cum Laude Graduate

Business Background:

Asset Preservation Advisors, LLC

Director of Finance & Operations, 2024 - Present

Senior Vice President, 2023 – 2023

Portfolio Manager / Credit Research Analyst, 2018 – 2023

Municipal Portfolio Managers Inc.

Chief Operating Officer, 2017 – 2018

Municipal Credit Analyst, 2012 – 2018

Item 3- Disciplinary Information

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. No information is applicable to Mrs. Butkus.

Item 4- Other Business Activities

No reportable other business activities.

Item 5- Additional Compensation

No reportable additional compensation.

Item 6 - Supervision

Mrs. Butkus is supervised by Kevin Woods who can be reached at (404) 261-1333.

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LORI COHANE
Asset Preservation Advisors, LLC

3344 Peachtree Road, Suite 2050

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March 30, 2026

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Item 2- Educational Background and Business Experience

Lori Cohane, Managing Director, Portfolio Manager

Year of Birth: 1960

Education:

State University of New York at Albany (B.S. in Finance – 1982)
Magna Cum Laude

Business Background:

Asset Preservation Advisors, LLC
Managing Director, 2024 – Present
Portfolio Manager, 2024 – Present

Credit Suisse Asset Management
Managing Director, 2002 – 2024

Morgan Stanley Asset Management
Managing Director, 1991 – 2002

Salomon Brothers Asset Management
Vice President, 1986 – 1991

Item 3- Disciplinary Information

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. No information is applicable to Ms. Cohane.

Item 4- Other Business Activities

No reportable other business activities.

Item 5- Additional Compensation

No reportable additional compensation.

Item 6 - Supervision

Ms. Cohane is supervised by Kevin Woods and Chuck Doty who can be reached at (404) 261-1333.

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BOB FARMER

Asset Preservation Advisors, LLC

3344 Peachtree Road, Suite 2050

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(404) 261-1333

March 30, 2026

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Additional information about Bob Farmer is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2- Educational Background and Business Experience

Bob Farmer, *Managing Director*

Year of Birth: 1951

Education:

The University of Richmond (M.B.A. – 1975)

Hampden Sydney College (B.S. in Economics – 1973)

Business Background:

Asset Preservation Advisors, LLC

Managing Director, 2008 – Present

Trusco Capital Management

Managing Director of Business Development, 1980 – 2008

Item 3- Disciplinary Information

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person

providing investment advice. No information is applicable to Mr. Farmer.

Item 4- Other Business Activities

No reportable additional outside business activities.

Item 5- Additional Compensation

No reportable additional compensation.

Item 6 - Supervision

Mr. Farmer is supervised by Kevin Woods who can be reached at (404) 261-1333.

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KYLE GERBERDING

Asset Preservation Advisors, LLC

3344 Peachtree Road, Suite 2050

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(404) 261-1333

March 30, 2026

This Brochure Supplement provides information about KYLE GERBERDING, which supplements the ASSET PRESERVATION ADVISORS, LLC Brochure. You should have received a copy of that Brochure. Please contact Tara Hart at 404-261-1333 if you did not receive ASSET PRESERVATION ADVISORS, LLC's Brochure or if you have any questions about the contents of this supplement.

Item 2- Educational Background and Business Experience

Kyle Gerberding, *Managing Director, Portfolio Manager, Partner*

Year of Birth: 1984

Education:

University of Florida (B.S. in Business and Sports Management – 2007)

Business Background:

Asset Preservation Advisors, LLC

Director of Trading, Portfolio Manager, Partner, 2021 – Present

Director of Trading, Portfolio Manager, 2008 – 2021

Item 3- Disciplinary Information

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. No information is applicable to Mr. Gerberding.

Item 4- Other Business Activities

No reportable additional outside business activities.

Item 5- Additional Compensation

No reportable additional compensation.

Item 6 - Supervision

Mr. Gerberding is supervised by Kevin Woods who can be reached at (404) 261-1333.

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MARY GREALY

Asset Preservation Advisors, LLC

3344 Peachtree Road, Suite 2050

Atlanta, GA 30326

(404) 261-1333

March 30, 2026

This Brochure Supplement provides information about MARY GREALY, which supplements the ASSET PRESERVATION ADVISORS, LLC Brochure. You should have received a copy of that Brochure. Please contact Tara Hart at 404-261-1333 if you did not receive ASSET PRESERVATION ADVISORS, LLC's Brochure or if you have any questions about the contents of this supplement.

Item 2- Educational Background and Business Experience

Mary Grealy, *Investor Relations Associate*

Year of Birth: 2000

Education:

Columbia University (B.A. in Psychology – 2023)

Business Background:

Asset Preservation Advisors, LLC

Investor Relations Associate, 2025 – Present

Belle Haven Investments

Investor Relations Associate, 2023 – 2025

Item 3- Disciplinary Information

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. No information is applicable to Ms. Grealy.

Item 4- Other Business Activities

No reportable other business activities.

Item 5- Additional Compensation

No reportable additional compensation.

Item 6 - Supervision

Ms. Grealy is supervised by Patricia "Trish" Hodgman who can be reached at (404) 261-1333.

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BRANDON HODGE

Asset Preservation Advisors, LLC

3344 Peachtree Road, Suite 2050

Atlanta, GA 30326

(404) 261-1333

March 30, 2026

This Brochure Supplement provides information about BRANDON HODGE, which supplements the ASSET PRESERVATION ADVISORS, LLC Brochure. You should have received a copy of that Brochure. Please contact Tara Hart at 404-261-1333 if you did not receive ASSET PRESERVATION ADVISORS, LLC's Brochure or if you have any questions about the contents of this supplement.

Item 2- Educational Background and Business Experience

Brandon Hodge, Associate, Trading and Operations

Year of Birth: 2001

Education:

University of South Carolina (B.S.B.A. in Finance – 2024)

Business Background:

Asset Preservation Advisors, LLC

Associate, Trading and Operations, 2025 – Present

Trading Analyst, 2024 – 2025

Trading Analyst Intern, 2023 – 2023

Forest Lake Country Club

Tennis Professional, 2022 – 2024

Shop Assistant, 2021 – 2024

Vantage Marketing

Sales Representative, 2021 – 2021

Item 3- Disciplinary Information

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. No information is applicable to Mr. Hodge.

Item 4- Other Business Activities

No reportable other business activities.

Item 5- Additional Compensation

No reportable additional compensation.

Item 6 - Supervision

Mr. Hodge is supervised by Kyle Gerberding who can be reached at (404) 261-1333.

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PATRICIA “TRISH” HODGMAN

Asset Preservation Advisors, LLC

3344 Peachtree Road, Suite 2050

Atlanta, GA 30326

(404) 261-1333

March 30, 2026

This Brochure Supplement provides information about PATRICIA HODGMAN, which supplements the ASSET PRESERVATION ADVISORS, LLC Brochure. You should have received a copy of that Brochure. Please contact Tara Hart at 404-261-1333 if you did not receive ASSET PRESERVATION ADVISORS, LLC’s Brochure or if you have any questions about the contents of this supplement.

Additional information about Patricia Hodgman is available on the SEC’s website at www.adviserinfo.sec.gov.

Item 2- Educational Background and Business Experience

Patricia Hodgman, *President, Partner*

Year of Birth: 1981

Education:

Hollins University (B.A. in Economics – 2003)

Business Background:

Asset Preservation Advisors, LLC

President, Partner, 2021 – Present

Vice President, Portfolio Manager, 2015 – 2021

Municipal Portfolio Managers, Inc.

Vice President, CCO, Co-Portfolio Manager, 2004 – 2015

Item 3- Disciplinary Information

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person

providing investment advice. No information is applicable to Mrs. Hodgman.

Item 4- Other Business Activities

No reportable other business activities.

Item 5- Additional Compensation

No reportable additional compensation.

Item 6 - Supervision

Mrs. Hodgman is supervised by Kevin Woods who can be reached at (404) 261-1333.

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PAUL NOLAN

Asset Preservation Advisors, LLC

3344 Peachtree Road, Suite 2050

Atlanta, GA 30326

(404) 261-1333

March 30, 2026

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Item 2- Educational Background and Business Experience

Paul Nolan, *Co-Director of Research*

Year of Birth: 1970

Education:

New York University School of Continuing and Professional Education (Courses taken included Corporate Financial Statement Analysis-attended – 1999)

The New School, Robert J. Milano Graduate School of Management and Urban Policy (M.S. in Urban Policy Analysis and Management – 1997)

State University of New York at Buffalo (B.A. in Political Science, concentrating in American Politics and International Relations – 1993)

Erie Community College South Campus (Liberal Studies and Business Administration Major September 1988 – May 1990)

Business Background:

Asset Preservation Advisors, LLC

Co-Director of Research, 2023 – Present

Director of Research, 2011 – 2022

McDonnell Investment Management, LLC
Fixed Income Analyst, 2006 – 2011

Moody's Investors Service
Analyst, 2001 – 2006

The New School-Vice President's Office of Student Affairs
Financial Analyst, 2000 – 2001

New York City Council, Finance Division, Capital Budget Unit
Principal Legislative Financial Analyst, 1997 – 2000

Item 3- Disciplinary Information

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. No information is applicable to Mr. Nolan.

Item 4- Other Business Activities

No reportable additional outside business activities.

Item 5- Additional Compensation

No reportable additional compensation.

Item 6 - Supervision

Mr. Nolan is supervised by Kevin Woods who can be reached at (404) 261-1333.

Item 1- Cover Page

LAUREN OLSEN, CFA[®]

Asset Preservation Advisors, LLC

3344 Peachtree Road, Suite 2050

Atlanta, GA 30326

(404) 261-1333

March 30, 2026

This Brochure Supplement provides information about LAUREN OLSEN, which supplements the ASSET PRESERVATION ADVISORS, LLC Brochure. You should have received a copy of that Brochure. Please contact Tara Hart at 404-261-1333 if you did not receive ASSET PRESERVATION ADVISORS, LLC's Brochure or if you have any questions about the contents of this supplement.

Item 2- Educational Background and Business Experience

Lauren Olsen, CFA[®], *Director, Portfolio Manager*

Year of Birth: 1988

Education:

Columbia University – School of International and Public Affairs (M.P.A. – 2024)

Boston College (B.A. in Economics – 2010)

Business Background:

Asset Preservation Advisors, LLC

Director/Portfolio Manager, 2026 – Present

Portfolio Manager/Municipal Analyst, 2024 – 2025

Credit Suisse Asset Management

Director – Municipal Credit Analyst/Trader, 2023 – 2024

Vice President – Municipal Credit Analyst/Trader, 2019 – 2022

Associate – Municipal Credit Analyst/Trader, 2015 – 2018

Municipal Credit Analyst, 2013 – 2015

S&P Capital IQ

Research Associate, 2010 – 2013

Ms. Olsen is a holder of the right to use the Chartered Financial Analyst® designation. CFA® and Chartered Financial Analyst® are registered trademarks owned by CFA Institute. To become a Chartered Financial Analyst®, an individual must satisfactorily fulfill the following requirements:

- Prerequisites/Experience –Candidate must meet one of the following requirements:
 - Undergraduate degree and 4 years of professional experience involving investment decision-making, or
 - 4 years qualified work experience (full time, but not necessarily investment related).
- Education – Self-study program (250 hours of study for each of the 3 levels).
- Examination – Pass 3 course exams.

There are no Continuing Education/Experience Requirements.

Item 3- Disciplinary Information

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. No information is applicable to Ms. Olsen.

Item 4- Other Business Activities

No reportable other business activities.

Item 5- Additional Compensation

No reportable additional compensation.

Item 6 - Supervision

Ms. Olsen is supervised by Lori Cohane who can be reached at (404) 261-1333.

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WESLEY POND, CFA®
Asset Preservation Advisors, LLC

3344 Peachtree Road, Suite 2050

Atlanta, GA 30326

(404) 261-1333

March 30, 2026

This Brochure Supplement provides information about WESLEY POND, which supplements the ASSET PRESERVATION ADVISORS, LLC Brochure. You should have received a copy of that Brochure. Please contact Tara Hart at 404-261-1333 if you did not receive ASSET PRESERVATION ADVISORS, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Wesley Pond is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2- Educational Background and Business Experience

Wesley Pond, CFA®, *Senior Vice President, Portfolio Manager*

Year of Birth: 1983

Education:

University of Georgia – Terry College of Business (M.B.A. in Finance – 2011)
Clemson University (B.S. in Financial Management – 2006)

Business Background:

Asset Preservation Advisors, LLC

Senior Vice President, 2024 – Present

Portfolio Manager, 2022 – Present

Municipal Trader / Credit Research Analyst, 2020 – 2022

Municipal Bond Trader, 2019 – 2020

SunTrust Investment Services, Inc.

Fixed Income Trader, 2014 – 2019

Raymond James & Associates, Inc.
Associate VP / Registered Sales Assistant, 2009 – 2014

Silverton Bank, N.A.
Asset Liability Service Bureau Manager, 2007 – 2009

Mr. Pond is a holder of the right to use the Chartered Financial Analyst® designation. CFA® and Chartered Financial Analyst® are registered trademarks owned by CFA Institute. To become a Chartered Financial Analyst®, an individual must satisfactorily fulfill the following requirements:

- Prerequisites/Experience – Candidate must meet one of the following requirements:
 - Undergraduate degree and 4 years of professional experience involving investment decision-making, or
 - 4 years qualified work experience (full time, but not necessarily investment related).
- Education – Self-study program (250 hours of study for each of the 3 levels).
- Examination – Pass 3 course exams.

There are no Continuing Education/Experience Requirements.

Item 3- Disciplinary Information

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. No information is applicable to Mr. Pond.

Item 4- Other Business Activities

No reportable additional outside business activities.

Item 5- Additional Compensation

No reportable additional compensation.

Item 6 - Supervision

Mr. Pond is supervised by Kevin Woods who can be reached at (404) 261-1333.

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MATTHEW RIGGLE

Asset Preservation Advisors, LLC

3344 Peachtree Road, Suite 2050

Atlanta, GA 30326

(404) 261-1333

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Item 2- Educational Background and Business Experience

Matthew Riggle, *Co-Director of Research*

Year of Birth: 1981

Education:

Georgia Institute of Technology (Master of Business Administration – 2012)

The University of Florida (B.S. in Economics – Year obtained 2004)

Major: Business, Cum Laude Graduate

Business Background:

Asset Preservation Advisors, LLC

Co-Director of Research, 2023 – Present

Vice President of Credit, 2017 – 2023

Senior Analyst, Year from 2013 – 2017

Analyst, 2006 – 2013

Suntrust

Financial Analyst, 2005 – 2006

Item 3- Disciplinary Information

Registered investment advisers are required to disclose all material facts regarding any

legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. No information is applicable to Mr. Riggle.

Item 4- Other Business Activities

No reportable other business activities.

Item 5- Additional Compensation

No reportable additional compensation.

Item 6 - Supervision

Mr. Riggle is supervised by Kevin Woods who can be reached at (404) 261-1333.

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HENRY TRAPNELL

Asset Preservation Advisors, LLC

3344 Peachtree Road, Suite 2050

Atlanta, GA 30326

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March 30, 2026

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Item 2- Educational Background and Business Experience

Henry Trapnell, *Associate*

Year of Birth: 2000

Education:

University (B.S. in Financial Planning and Services – 2023)

Business Background:

Asset Preservation Advisors, LLC

Associate, 2025 – Present

Junior Associate, 2023 – 2025

Student, 2014 – 2023

Item 3- Disciplinary Information

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. No information is applicable to Mr. Welch.

Item 4- Other Business Activities

No reportable other business activities.

Item 5- Additional Compensation

No reportable additional compensation.

Item 6 - Supervision

Mr. Trapnell is supervised by Lori Cohane who can be reached at (404) 261-1333.

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KYLE TURNIER

Asset Preservation Advisors, LLC

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(404) 261-1333

March 30, 2026

This Brochure Supplement provides information about KYLE TURNIER, which supplements the ASSET PRESERVATION ADVISORS, LLC Brochure. You should have received a copy of that Brochure. Please contact Tara Hart at 404-261-1333 if you did not receive ASSET PRESERVATION ADVISORS, LLC's Brochure or if you have any questions about the contents of this supplement.

Item 2- Educational Background and Business Experience

Kyle Turnier, *Director of Investor Relations*

Year of Birth: 1990

Education:

University (B.A. in Business Administration: Finance – 2012)

Business Background:

Asset Preservation Advisors, LLC

Director of Investor Relations, 2025 – Present

Belle Haven Investments

Head of Investor Relations, 2022 – 2025

Vice President, Investor Relations, 2019 – 2022

Item 3- Disciplinary Information

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. No information is applicable to Mr. Turnier.

Item 4- Other Business Activities

No reportable other business activities.

Item 5- Additional Compensation

No reportable additional compensation.

Item 6 - Supervision

Mr. Turnier is supervised by Kevin Woods who can be reached at (404) 261-1333.

Item 1- Cover Page

THOMAS “TOMMY” WELCH

Asset Preservation Advisors, LLC

3344 Peachtree Road, Suite 2050

Atlanta, GA 30326

(404) 261-1333

March 30, 2026

This Brochure Supplement provides information about THOMAS WELCH, which supplements the ASSET PRESERVATION ADVISORS, LLC Brochure. You should have received a copy of that Brochure. Please contact Tara Hart at 404-261-1333 if you did not receive ASSET PRESERVATION ADVISORS, LLC’s Brochure or if you have any questions about the contents of this supplement.

Item 2- Educational Background and Business Experience

Thomas Welch, *Vice President, Trader*

Year of Birth: 1994

Education:

Auburn University (B.B.A. in Supply Chain Management – 2018)

Business Background:

Asset Preservation Advisors, LLC

Vice President / Trader, 2026 – Present

Associate Trader, 2022 – 2025

ICE Futures U.S.

Market Analyst, 2018 – 2022

Item 3- Disciplinary Information

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. No information is applicable to Mr. Welch.

Item 4- Other Business Activities

No reportable other business activities.

Item 5- Additional Compensation

No reportable additional compensation.

Item 6 - Supervision

Mr. Welch is supervised by Kyle Gerberding who can be reached at (404) 261-1333.

Item 1- Cover Page

WESLEY WILLIAMS
Asset Preservation Advisors, LLC

3344 Peachtree Road, Suite 2050

Atlanta, GA 30326

(404) 261-1333

March 30, 2026

This Brochure Supplement provides information about WESLEY WILLIAMS, which supplements the ASSET PRESERVATION ADVISORS, LLC Brochure. You should have received a copy of that Brochure. Please contact Tara Hart at 404-261-1333 if you did not receive ASSET PRESERVATION ADVISORS, LLC's Brochure or if you have any questions about the contents of this supplement.

Item 2- Educational Background and Business Experience

Wesley Williams, *Chief Operating Officer*

Year of Birth: 1987

Education:

The Georgia Institute of Technology (Master of Business Administration – 2017)

The University of Mississippi (B.B.A. in Finance – 2010)

Business Background:

Asset Preservation Advisors, LLC

Chief Operating Officer, 2023 – Present

Vice President, Partner, 2021 – 2023

Vice President / Portfolio Manager, 2012 – 2023

Morgan Stanley

Financial Advisor, 2012

Sterne, Agee & Leach

Financial Advisor, 2011 – 2012

Item 3- Disciplinary Information

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. No information is applicable to Mr. Williams.

Item 4- Other Business Activities

No reportable additional outside business activities.

Item 5- Additional Compensation

No reportable additional compensation.

Item 6 - Supervision

Mr. Williams is supervised by Kevin Woods and Chuck Doty who can be reached at (404) 261-1333.