

**Part 2B of Form ADV: *Brochure Supplement***

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**This brochure supplement provides information about J. Marc Albertson that supplements the Patton Albertson Miller Group, LLC brochure. You should have received a copy of that brochure. Please contact J. Marc Albertson if you did not receive Patton Albertson Miller Group, LLC's brochure or if you have any questions about the contents of this supplement.**

Additional information about J. Marc Albertson is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## **Item 2. Educational Background and Business Experience**

J. Marc Albertson

*Year of Birth:* 1954

### *Education:*

- Southern Trust School, Certificate in Trusts, 1980
- National Graduate Trust School, received Certified Financial Services Counselor (CFSC) designation, 1984

### *Professional Designations:*

- CERTIFIED FINANCIAL PLANNER™, granted by the Certified Financial Planner Board of Standards, Inc. (Washington, DC), 2002<sup>1</sup>

### *Business Background:*

- Patton Albertson Miller Group, LLC (successor to Patton Albertson & Miller, LLC), Principal and Director of Client Services, 2003—Present

## **Item 3. Disciplinary Information**

Mr. Albertson has no history of any disciplinary events.

## **Item 4. Other Business Activities**

Mr. Albertson is a founding partner and member of Patton Albertson Miller Group, LLC, (successor to Patton Albertson & Miller, LLC) which is the single member of a Member- Managed South Dakota Limited Liability Company, PAM Fiduciary Services Limited, LLC ("PFSL"). PFSL was formed to serve as an entity under South Dakota Codified Laws (SDCL) §51A-6A-66 for the purpose of serving as a limited independent

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<sup>1</sup> The program is administered by the Certified Financial Planner Board of Standards Inc. Those with the CFP® designation have demonstrated competency in all areas of finance related to financial planning. Candidates complete studies on over 100 topics, including stocks, bonds, taxes, insurance, retirement planning and estate planning. In addition to passing the CFP certification exam, candidates must also complete qualifying work experience and agree to adhere to the CFP Board's code of ethics and professional responsibility and financial planning standards.

trustee which may include the roles of trust protector, investment advisor and/or distribution advisor. LLC's serving in this capacity are not required to hold trust powers under South Dakota law. PFSL may only serve in this role for trusts with a South Dakota situs. Under Rule 206(4)2 of the Investment Advisors Act of 1940, PAM is deemed to have custody of accounts under which PFSL serves as an independent trustee.

**Item 5. Additional Compensation**

Mr. Albertson may directly or indirectly receive earn-out or other compensation from Focus Financial Partners, LLC, the indirect parent company of PAM.

**Item 6. Supervision**

James Patton, Chief Executive Officer, William Miller, Chief Investment Officer, and Lisa M. Bryant, Chief Compliance Officer are responsible for the supervision and monitoring of investment advice offered to advisory clients of Patton Albertson Miller Group, LLC. These individuals oversee all material investment policy changes and conduct periodic testing to ensure that client objectives and mandates are being met. They can be reached at (423) 414-2100.