

Part 2B of Form ADV: Brochure Supplement Appendix

This brochure supplement is provided on our employee, G. Walter Christopherson, along with the following contact information:

G. Walter Christopherson, Chairman
Linscomb & Williams, Inc.
1333 West Loop South, Suite 1500, Houston, TX 77027
wchristopherson@linscomb-williams.com
713.840.1000

April 26, 2023

This brochure supplement provides information about G. Walter Christopherson that supplements our Form ADV, Part 2A (attached). You should have received a copy of that brochure as we include this supplement with all copies. Please contact G. Walter Christopherson if you did not receive our brochure or if you have any questions about the contents of this supplement.

Educational Background and Business Experience

G. WALTER CHRISTOPHERSON is the Chairman of the Linscomb & Williams (L&W) Board of Directors and Chairman of the Investment Committee. He has previously served as Chief Investment Officer. He also is a member of the L&W Executive Committee. He has been a Wealth Advisor at L&W since 1982. He served as senior financial planner for Rotan Mosle, a regional brokerage firm, prior to joining L&W. He graduated *cum laude* from DePauw University, earned his master's degree from Yale University and received his law degree (JD) from the University of Kentucky College of Law. He has held memberships in the Phi Delta Phi Law Fraternity, State Bar of Texas, American Bar Association Tax Section and Texas Society of Certified Public Accountants. He has served as a director and past board president of the Krist Samaritan Center, and is on the board of directors for the Westview School. Walter is a CERTIFIED FINANCIAL PLANNER™ professional and a former Certified Public Accountant (CPA). Walter was born in 1951. See the Appendix at the end of this Supplement for an explanation of the qualifications required for each professional designation.

Disciplinary Information - None

Other Business Activities - None

Additional Compensation – None

Supervision

As President & CEO of Linscomb & Williams, Phillip P. Hamman maintains ultimate responsibility for the advisory activities of the firm. Mr. Hamman discusses investment decisions and operational matters with the other senior personnel of the firm and the Executive Committee. Mr. Hamman and other senior personnel can be reached at 713-840-1000.

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This brochure supplement is provided on our employee, Phillip P. Hamman, along with the following contact information:

Phillip P. Hamman, President & CEO
Linscomb & Williams, Inc.
1333 West Loop South, Suite 1500, Houston, TX 77027
phamman@linscomb-williams.com
713.840.1000

April 26, 2023

This brochure supplement provides information about Phillip P. Hamman that supplements our Form ADV, Part 2A (attached). You should have received a copy of that brochure as we include this supplement with all copies. Please contact Phillip P. Hamman if you did not receive our brochure or if you have any questions about the contents of this supplement.

Educational Background and Business Experience

PHILLIP P. HAMMAN is the President & CEO of Linscomb & Williams (L&W) and has served in this capacity since June 2022. He also is a member of the L&W Board of Directors and Executive Committee. He has served as President of L&W since 2018. He joined L&W as a Wealth Advisor and Director of Financial Planning in April 2013. Phillip has served as Chairman of the firm's Wealth Management Committee since joining L&W in 2013. Prior to joining L&W, Phillip worked for Tolleson Wealth Management in Dallas from 2009 to 2013. While at Tolleson, Phillip served as a director for their client advisory team from approximately January 2011 to April 2013, and he served as a manager for their client advisory team from approximately April 2009 to January 2011. Prior to Tolleson, Phillip served in multiple roles for Kanaly Trust Company in Houston from 2001 to 2009. He began his career as a financial planner, and he was serving as a Senior Wealth Advisor for the firm. Phillip graduated from Texas Tech University with a Bachelor of Science degree in personal financial planning. Phillip also serves as an industry professional member of the Wealth Management advisory board for the University of Houston. Phillip is a member of the CFA[®] Institute, Financial Planning Association (FPA), and the Investments & Wealth Institute[™]. He is a CFA[®] charterholder, Certified Private Wealth Advisor[®] professional and a CERTIFIED FINANCIAL PLANNER[™] professional. Phillip was born in 1979. See the Appendix at the end of this Supplement for an explanation of the qualifications required for each professional designation.

Disciplinary Information - None

Other Business Activities - None

Additional Compensation – None

Supervision

Phillip P. Hamman reports to the L&W Board of Directors. While Mr. Hamman maintains ultimate responsibility for the advisory activities of the firm, he discusses investment decisions and operational matters with several of the firm's oversight committees. As Chairman of the L&W Board of Directors, Walter Christopherson can be reached at 713-840-1000.

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This brochure supplement is provided on our employee, Ryan L. Patterson, along with the following contact information:

Ryan L. Patterson, Chief Investment Officer
Linscomb & Williams, Inc.
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rpatterson@linscomb-williams.com
713.840.1000

March 22, 2023

This brochure supplement provides information about Ryan L. Patterson that supplements our Form ADV, Part 2A (attached). You should have received a copy of that brochure as we include this supplement with all copies. Please contact Ryan L. Patterson if you did not receive our brochure or if you have any questions about the contents of this supplement.

Educational Background and Business Experience

RYAN L. PATTERSON is the Chief Investment Officer of Linscomb & Williams (L&W) and has served in this capacity since March 2014 and served as a Wealth Advisor from January 2012 to February 2014. He is a member of the L&W Executive Committee and Board of Directors. Prior to joining L&W, he managed investment portfolios and financial planning engagements for UHY Advisors, a middle market accounting firm and previous to that, Envestnet, an asset management firm based in Chicago. Ryan graduated from Texas State University with a Bachelor of Business Administration degree in finance. He is a member of the Financial Planning Association (FPA) and CFA[®] Institute. He has spent many hours helping man the front desk at the Ronald McDonald House Houston and has volunteered to host and guide the Sargent Tournament of Heroes, a recreational fishing tournament for disabled military veterans. He also serves on the finance committee for a local private school. Ryan is a CFA[®] charterholder and a CERTIFIED FINANCIAL PLANNER[™] professional. Ryan was born in 1981. See the Appendix at the end of this Supplement for an explanation of the qualifications required for each professional designation.

Disciplinary Information - None

Other Business Activities - None

Additional Compensation – None

Supervision

Mr. Patterson's investment advisory activities are supervised by Phillip P. Hamman. As President & CEO of Linscomb & Williams, Phillip P. Hamman maintains ultimate responsibility for the advisory activities of the firm. Mr. Hamman discusses investment decisions and operational matters with the other senior personnel of the firm and the Executive Committee. Mr. Hamman and other senior personnel can be reached at 713-840-1000.

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This brochure supplement is provided on our employee, Heidi L. Davis, along with the following contact information:

Heidi L. Davis, Senior Wealth Advisor
Linscomb & Williams, Inc.
1333 West Loop South, Suite 1500, Houston, TX 77027
hdavis@linscomb-williams.com
713.840.1000

March 22, 2023

This brochure supplement provides information about Heidi L. Davis that supplements our Form ADV, Part 2A (attached). You should have received a copy of that brochure as we include this supplement with all copies. Please contact Heidi L. Davis if you did not receive our brochure or if you have any questions about the contents of this supplement.

Educational Background and Business Experience

HEIDI L. DAVIS is a Senior Wealth Advisor with Linscomb & Williams (L&W) and has served in this role since 1993. Prior to joining L&W, Heidi worked 13 years with Exxon, an international oil and gas firm. She graduated from the University of Florida with a degree in business and a Master of Business Administration (MBA). She has held memberships in the Financial Planning Association (FPA), American Institute of Certified Public Accountants, the Texas Society of Certified Public Accountants and the Houston Business & Estate Planning Council. Heidi served on the Board of the Wesley Community Center, the Foundation Board of St. Luke's Methodist Church and on various committees for Amazing Place. She also served as president and board member of the Alzheimer's Association – Houston Chapter. Currently, Heidi serves as an Investment Committee member on the METRO Non-Union Pension Fund, a Houston public transit authority. Heidi is a Certified Public Accountant (CPA), a CERTIFIED FINANCIAL PLANNER™ professional, and a Personal Financial Specialist (PFS). Heidi was born in 1953. See the Appendix at the end of this Supplement for an explanation of the qualifications required for each professional designation.

Disciplinary Information - None

Other Business Activities - None

Additional Compensation – None

Supervision

As President & CEO of Linscomb & Williams, Phillip P. Hamman maintains ultimate responsibility for the advisory activities of the firm. Mr. Hamman discusses investment decisions and operational matters with the other senior personnel of the firm and the Executive Committee. Mr. Hamman and other senior personnel can be reached at 713-840-1000.

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This brochure supplement is provided on our employee, Carolyn A. Galfione, along with the following contact information:

Carolyn A. Galfione, Senior Wealth Advisor
Linscomb & Williams, Inc.
1333 West Loop South, Suite 1500, Houston, TX 77027
cgalfione@linscomb-williams.com
713.840.1000

March 22, 2023

This brochure supplement provides information about Carolyn A. Galfione that supplements our Form ADV, Part 2A (attached). You should have received a copy of that brochure as we include this supplement with all copies. Please contact Carolyn A. Galfione if you did not receive our brochure or if you have any questions about the contents of this supplement.

Educational Background and Business Experience

CAROLYN A. GALFIONE is a Senior Wealth Advisor with Linscomb & Williams (L&W) and has served in this role since 2004. Prior to joining the Advisory Team, she served as the firm's CFO. Carolyn has been with L&W since 1996. Prior to that, Carolyn practiced accounting in the tax department of Melton & Melton, a large Houston accounting firm from 1972 to 1984. She was a Business Administrator with West University Methodist Church from 1989 to 1996. Carolyn graduated from the University of Texas at Austin with a degree in accounting, and earned a Master of Business Administration (MBA) with a concentration in finance from Rice University. She has been a member of the American Institute of Certified Public Accountants, has held positions as a board member in the City of West University Place, was past president of the Rice University Business School Alumni Board, currently serves on the finance committee and is a board member of the Women's Resource of Greater Houston, and is a member of the Executive Women's Partnership (EWP) Committee for the Greater Houston Partnership. She is a Certified Public Accountant (CPA) and a CERTIFIED FINANCIAL PLANNER™ professional. Carolyn was born in 1950. See the Appendix at the end of this Supplement for an explanation of the qualifications required for each professional designation.

Disciplinary Information – None

Other Business Activities - None

Additional Compensation - None

Supervision

As President & CEO of Linscomb & Williams, Phillip P. Hamman maintains ultimate responsibility for the advisory activities of the firm. Mr. Hamman discusses investment decisions and operational matters with the other senior personnel of the firm and the Executive Committee. Mr. Hamman and other senior personnel can be reached at 713-840-1000.

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This brochure supplement is provided on our employee, Edward R. Fullerton, along with the following contact information:

Edward R. Fullerton, Senior Wealth Advisor
Linscomb & Williams, Inc.
1333 West Loop South, Suite 1500, Houston, TX 77027
efullerton@linscomb-williams.com
713.840.1000

March 22, 2023

This brochure supplement provides information about Edward R. Fullerton that supplements our Form ADV, Part 2A (attached). You should have received a copy of that brochure as we include this supplement with all copies. Please contact Edward R. Fullerton if you did not receive our brochure or if you have any questions about the contents of this supplement.

Educational Background and Business Experience

EDWARD R. FULLERTON is a Senior Wealth Advisor with Linscomb & Williams (L&W) and has been with the firm since 2003. Ed developed and implemented a comprehensive employee benefits program for Compaq Computer Corporation, a Fortune 500 corporation and served as Director & Chief Benefits Officer of Employee Benefits at the University of Texas Health Science Center-Houston from 1996 to 2003. Ed's experience includes serving as a financial planning officer in the trust division of Bank of Southwest, a national bank, in Houston, Texas. He has comprehensive experience regarding retirement programs for tax-exempt organizations, including investment option selection and retirement counseling. He earned his business degree from the University of Houston. He is a Chartered Life Underwriter (CLU) and Chartered Financial Consultant (ChFC). Ed was born in 1943. See the Appendix at the end of this Supplement for an explanation of the qualifications required for each professional designation.

Disciplinary Information - None

Other Business Activities - None

Additional Compensation – None

Supervision

As President & CEO of Linscomb & Williams, Phillip P. Hamman maintains ultimate responsibility for the advisory activities of the firm. Mr. Hamman discusses investment decisions and operational matters with the other senior personnel of the firm and the Executive Committee. Mr. Hamman and other senior personnel can be reached at 713-840-1000.

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This brochure supplement is provided on our employee, Troy W. Taylor, along with the following contact information:

Troy W. Taylor, Senior Wealth Advisor
Linscomb & Williams, Inc.
1333 West Loop South, Suite 1500, Houston, TX 77027
ttaylor@linscomb-williams.com
713.840.1000

March 22, 2023

This brochure supplement provides information about Troy W. Taylor that supplements our Form ADV, Part 2A (attached). You should have received a copy of that brochure as we include this supplement with all copies. Please contact Troy W. Taylor if you did not receive our brochure or if you have any questions about the contents of this supplement.

Educational Background and Business Experience

TROY W. TAYLOR is a Senior Wealth Advisor with Linscomb & Williams (L&W) and has served in this role since 2015. Prior to joining L&W, he was a Senior Wealth Advisor and Regional Manager at Cadence Bank in their investments division. From 2003 to 2013, he was a Principal at Amegy Bank in their Private Client Investments group. Troy graduated from Chapman University with a degree in pre-law social sciences and earned his MBA from Cornell University. He is a CERTIFIED FINANCIAL PLANNER™ professional and a Registered Investment Adviser Representative. Troy has served on the Advisory Board and Development Committee of Child Advocates and is involved with many community outreach activities through L&W and his church. Troy was born in 1967. See the Appendix at the end of this Supplement for an explanation of the qualifications required for each professional designation.

Disciplinary Information - None

Other Business Activities - None

Additional Compensation – None

Supervision

Mr. Taylor's advisory activities are supervised by Phillip P. Hamman. As President & CEO of Linscomb & Williams, Phillip P. Hamman maintains ultimate responsibility for the advisory activities of the firm. Mr. Hamman discusses investment decisions and operational matters with the other senior personnel of the firm and the Executive Committee. Mr. Hamman and other senior personnel can be reached at 713-840-1000.

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This brochure supplement is provided on our employee, Lauren J. Rich, along with the following contact information:

Lauren J. Rich, Wealth Advisor
Linscomb & Williams, Inc.
1333 West Loop South, Suite 1500, Houston, TX 77027
lrich@linscomb-williams.com
713.840.1000

March 22, 2023

This brochure supplement provides information about Lauren J. Rich that supplements our Form ADV, Part 2A (attached). You should have received a copy of that brochure as we include this supplement with all copies. Please contact Lauren J. Rich if you did not receive our brochure or if you have any questions about the contents of this supplement.

Educational Background and Business Experience

LAUREN J. RICH is a Wealth Advisor with Linscomb & Williams (L&W) and has served in this role since January 2018. Prior to that, she was a Senior Financial Planner for the firm from April 2016 through December 2017, a Financial Planner from May 2012 to April 2016, and a Client Service Associate/Account Administrator from February 2011 to May 2012. Before joining L&W, Lauren was a Senior Financial Analyst at an investment consulting firm in downtown Houston for 2.5 years. She holds a Bachelor in Business Administration degree in finance from The University of Texas at Austin. Lauren is a CERTIFIED FINANCIAL PLANNER™ professional. She holds an active membership with the Financial Planning Association (FPA). Lauren was born in 1984. See the Appendix at the end of this Supplement for an explanation of the qualifications required for each professional designation.

Disciplinary Information - None

Other Business Activities - None

Additional Compensation – None

Supervision

Ms. Rich's advisory activities are supervised by Phillip P. Hamman. As President & CEO of Linscomb & Williams, Phillip P. Hamman maintains ultimate responsibility for the advisory activities of the firm. Mr. Hamman discusses investment decisions and operational matters with the other senior personnel of the firm and the Executive Committee. Mr. Hamman and other senior personnel can be reached at 713-840-1000.

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This brochure supplement is provided on our employee, Jessica N. Banitt, along with the following contact information:

Jessica N. Banitt, Wealth Advisor
Linscomb & Williams, Inc.
1333 West Loop South, Suite 1500, Houston, TX 77027
jbanitt@linscomb-williams.com
713.840.1000

March 22, 2023

This brochure supplement provides information about Jessica N. Banitt that supplements our Form ADV, Part 2A (attached). You should have received a copy of that brochure as we include this supplement with all copies. Please contact Jessica N. Banitt if you did not receive our brochure or if you have any questions about the contents of this supplement.

Educational Background and Business Experience

JESSICA N. BANITT is a Wealth Advisor with Linscomb & Williams (L&W) and has served in this role since January 2019. Prior to that, she was a Senior Financial Planner for the firm from June 2016 through December 2018. Before joining L&W, Jessica was an auditor at PricewaterhouseCoopers for 1.5 years. She holds a Bachelor of Science degree in business administration from The University of Dayton. Jessica is a Certified Public Accountant (CPA) and a CERTIFIED FINANCIAL PLANNER™ professional. She holds an active membership with the Financial Planning Association (FPA) and the Texas Society of CPAs. Jessica was born in 1992. See the Appendix at the end of this Supplement for an explanation of the qualifications required for each professional designation.

Disciplinary Information – None

Other Business Activities – None

Additional Compensation – None

Supervision

Ms. Banitt's advisory activities are supervised by Lauren Rich, Wealth Advisor Team Lead in Houston, Texas. Additionally, as President & CEO of Linscomb & Williams, Phillip P. Hamman maintains ultimate responsibility for the advisory activities of the firm. Mr. Hamman discusses investment decisions and operational matters with the other senior personnel of the firm and the Executive Committee. Ms. Rich, Mr. Hamman and other senior personnel can be reached at 713-840-1000.

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This brochure supplement is provided on our employee, Neal Wadley, along with the following contact information:

Neal Wadley, Wealth Advisor
Linscomb & Williams, Inc.
1333 West Loop South, Suite 1500, Houston, TX 77027
nwadley@linscomb-williams.com
713.840.1000

April 12, 2023

This brochure supplement provides information about Neal Wadley that supplements our Form ADV, Part 2A (attached). You should have received a copy of that brochure as we include this supplement with all copies. Please contact Neal Wadley if you did not receive our brochure or if you have any questions about the contents of this supplement.

Educational Background and Business Experience

NEAL WADLEY is a Wealth Advisor with Linscomb & Williams (L&W) and has served in this capacity since August 2022. Prior to joining L&W, Neal was a Director and Senior Portfolio Manager at BMO Wealth Management in Dallas from April 2019 to August 2022 and a Vice President and Senior Financial Planner at Westwood Wealth Management in Dallas from November 2017 to April 2019. Prior to Westwood, Neal served in multiple roles on the Client Advisory Team at Tolleson Wealth Management, a multi-family office in Dallas, for nearly 12 years from 2005 to 2017, which culminated in his role as Director and lead wealth advisor for clients. He began his career at a community bank in Oklahoma and as an analyst in Bank of America's Private Wealth & Investment Management group in Dallas. Neal graduated from The University of Oklahoma with a Bachelor of Business Administration in Finance. He is a CERTIFIED FINANCIAL PLANNER™ professional and a Certified Investment Management Analyst® designee. He is also a member of the Investments & Wealth Institute™, the Financial Planning Association (FPA), and the Houston Estate & Financial Forum. Neal was born in 1978. See the Appendix at the end of this Supplement for an explanation of the qualifications required for each professional designation.

Disciplinary Information - None

Other Business Activities - None

Additional Compensation – None

Supervision

Neal Wadley reports to Lauren Rich, Wealth Advisor Team Lead in Houston, Texas. Additionally, as President & CEO of Linscomb & Williams, Phillip P. Hamman maintains ultimate responsibility for the advisory activities of the firm. Mr. Hamman discusses investment decisions and operational matters with the other senior personnel of the firm and the Executive Committee. Ms. Rich, Mr. Hamman and other senior personnel can be reached at 713-840-1000.

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This brochure supplement is provided on our employee, Cole Wheeler, along with the following contact information:

Cole Wheeler, Wealth Advisor
Linscomb & Williams, Inc.
1333 West Loop South, Suite 1500, Houston, TX 77027
cwheeler@linscomb-williams.com
713.840.1000

March 22, 2023

This brochure supplement provides information about Cole Wheeler that supplements our Form ADV, Part 2A (attached). You should have received a copy of that brochure as we include this supplement with all copies. Please contact Cole Wheeler if you did not receive our brochure or if you have any questions about the contents of this supplement.

Educational Background and Business Experience

COLE WHEELER is a Wealth Advisor with Linscomb & Williams (L&W) and has served in this role since 2023. Mr. Wheeler joined L&W as a Financial Planner in 2019. Cole graduated *cum laude* from Texas A&M University in 2018 with a bachelor's degree in economics. He holds a membership in the Financial Planning Association of Houston. Cole is a CERTIFIED FINANCIAL PLANNER™ professional. He was born in 1996. See the Appendix at the end of this Supplement for an explanation of the qualifications required for each professional designation.

Disciplinary Information - None

Other Business Activities - None

Additional Compensation – None

Supervision

Mr. Wheeler's advisory activities are supervised by Lauren Rich, Wealth Advisor Team Lead in Houston, Texas. Additionally, as President & CEO of Linscomb & Williams, Phillip P. Hamman maintains ultimate responsibility for the advisory activities of the firm. Mr. Hamman discusses investment decisions and operational matters with the other senior personnel of the firm and the Executive Committee. Ms. Rich, Mr. Hamman and other senior personnel can be reached at 713-840-1000.

Part 2B of Form ADV: Brochure Supplement Appendix

This brochure supplement is provided on our employee, Nicolas “Nick” X. Ibanez, along with the following contact information:

Nicholas “Nick” X. Ibanez, Wealth Advisor
Linscomb & Williams, Inc.
1333 West Loop South, Suite 1500, Houston, TX 77027
nibanez@linscomb-williams.com
713.840.1000

March 22, 2023

This brochure supplement provides information about Nick Ibanez that supplements our Form ADV, Part 2A (attached). You should have received a copy of that brochure as we include this supplement with all copies. Please contact Nick Ibanez if you did not receive our brochure or if you have any questions about the contents of this supplement.

Educational Background and Business Experience

NICK X. IBANEZ is a Wealth Advisor with Linscomb & Williams (L&W) and has served in this role since July 2019. Prior to advancing to Wealth Advisor, Nick served as a Financial Planner for nearly 2 years and was a Fixed Income Analyst and Trader for 5 years while at L&W. Prior to joining L&W, he was a Registered Associate of Southwest Securities from 2010 to 2013. He also worked for the Municipal Advisory Council of Texas as an Analyst from 2008 to 2010. Nick is a CERTIFIED FINANCIAL PLANNER™ professional. Nick was born in 1985. See the Appendix at the end of this Supplement for an explanation of the qualifications required for each professional designation.

Disciplinary Information - None

Other Business Activities - None

Additional Compensation – None

Supervision

Mr. Ibanez’s advisory activities are supervised by Phillip P. Hamman. As President & CEO of Linscomb & Williams, Phillip P. Hamman maintains ultimate responsibility for the advisory activities of the firm. Mr. Hamman discusses investment decisions and operational matters with the other senior personnel of the firm and the Executive Committee. Mr. Hamman and other senior personnel can be reached at 713-840-1000.

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This brochure supplement is provided on our employee, B. Craig Ivy, along with the following contact information:

B. Craig Ivy, Wealth Advisor
Linscomb & Williams, Inc.
1333 West Loop South, Suite 1500, Houston, TX 77027
civy@linscomb-williams.com
713.840.1000

March 22, 2023

This brochure supplement provides information about B. Craig Ivy that supplements our Form ADV, Part 2A (attached). You should have received a copy of that brochure as we include this supplement with all copies. Please contact B. Craig Ivy if you did not receive our brochure or if you have any questions about the contents of this supplement.

Educational Background and Business Experience

B. CRAIG IVY is a Wealth Advisor with Linscomb & Williams (L&W) and has served in this role since October 2015. Prior to joining L&W, he was an Advisor in the wealth management division of Merrill Lynch from 2011-2015. While there, the firm selected him to serve as a subject matter expert in multiple financial areas, while also mentoring newly hired professionals. Before moving to Texas, Craig was a member of the management team for a privately held business in real estate development and construction in Georgia from 2005 to 2007. His involvement in the financial management of the business led to a position in the wealth management profession with a publicly held Georgia bank from 2007 to 2012. Family ties ultimately resulted in the relocation to Texas. Craig has held memberships in the Houston Chapter of Young Professionals in Finance, as well as The Woodlands Chamber of Commerce. He is a CERTIFIED FINANCIAL PLANNER™ professional. Craig balances his professional responsibilities with being a father of four and serving as an active volunteer with Habitat for Humanity. Craig was born in 1981. See the Appendix at the end of this Supplement for an explanation of the qualifications required for each professional designation.

Disciplinary Information - None

Other Business Activities - None

Additional Compensation – None

Supervision

Mr. Ivy's advisory activities are supervised by Nick Ibanez, Wealth Advisor Team Lead in Houston, Texas. Additionally, as President & CEO of Linscomb & Williams, Phillip P. Hamman maintains ultimate responsibility for the advisory activities of the firm. Mr. Hamman discusses investment decisions and operational matters with the other senior personnel of the firm and the Executive Committee. Mr. Ibanez, Mr. Hamman and other senior personnel can be reached at 713-840-1000.

Part 2B of Form ADV: Brochure Supplement Appendix

This brochure supplement is provided on our employee, Ashley Trlica, along with the following contact information:

Ashley N. Trlica, Wealth Advisor
Linscomb & Williams, Inc.
1333 West Loop South, Suite 1500, Houston, TX 77027
atrlica@linscomb-williams.com
713-840-1000

March 22, 2023

This brochure supplement provides information about Ashley Trlica that supplements our Form ADV, Part 2A (attached). You should have received a copy of that brochure as we include this supplement with all copies. Please contact Ashley Trlica if you did not receive our brochure or if you have any questions about the contents of this supplement.

Educational Background and Business Experience

ASHLEY N. TRLICA is a Wealth Advisor at Linscomb & Williams (L&W) since 2023 and previously held the role as a Senior Analyst. She has been with the firm since 2014. Prior to joining L&W, Ashley served as Assistant Wealth Advisor with Tanglewood Legacy Advisors and as a Financial Planner with BBVA Wealth Solutions. Ashley graduated from the University of Houston in 2011 with a Bachelor of Business Administration degree in finance. She holds an active membership with the Financial Planning Association (FPA). Ashley is a CERTIFIED FINANCIAL PLANNER™ professional and holds the Accredited Estate Planner® (AEP®) designation. She was born in 1986. See the Appendix at the end of this Supplement for an explanation of the qualifications required for each professional designation.

Disciplinary Information - None

Other Business Activities - None

Additional Compensation – None
Supervision

Ms. Trlica's advisory activities are supervised by Nick Ibanez, Wealth Advisor Team Lead in Houston, Texas. Additionally, as President & CEO of Linscomb & Williams, Phillip P. Hamman maintains ultimate responsibility for the advisory activities of the firm. Mr. Hamman discusses investment decisions and operational matters with the other senior personnel of the firm and the Executive Committee. Mr. Ibanez, Mr. Hamman and other senior personnel can be reached at 713-840-1000.

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This brochure supplement is provided on our employee, MaryJane M. LeCroy, along with the following contact information:

MaryJane M. LeCroy, Senior Wealth Advisor
Linscomb & Williams, Inc.
2727 Paces Ferry Road SE, Building Two, Suite 1475
Atlanta, GA 30339
mlecroy@linscomb-williams.com
770.333.0113 x111

March 22, 2023

This brochure supplement provides information about MaryJane M. LeCroy that supplements our Form ADV, Part 2A (attached). You should have received a copy of that brochure as we include this supplement with all copies. Please contact MaryJane M. LeCroy if you did not receive our brochure or if you have any questions about the contents of this supplement.

Educational Background and Business Experience

MARYJANE M. LECROY is a Senior Wealth Advisor with Linscomb & Williams (L&W). She was with Wealth & Pension Services (and one of its predecessor firms, Hammond Financial Planning Corporation) since 2001. L&W acquired Wealth & Pension Services in 2019. She graduated from Auburn University with a degree in business administration. She has held memberships in the Financial Planning Association (FPA) and the Estate Planning Council of North Georgia. MaryJane currently serves as the Financial Treasurer of her church. Mr. LeCroy also serves on as board member of the Stonehaven Trust Company, an institutional fiduciary services company that sponsors employee stock ownership plans and trusts. MaryJane is a CERTIFIED FINANCIAL PLANNER™ professional. MaryJane was born in 1976. See the Appendix at the end of this Supplement for an explanation of the qualifications required for each professional designation.

Disciplinary Information - None

Other Business Activities - None

Additional Compensation – None

Supervision

Ms. LeCroy's advisory activities are supervised by Phillip P. Hamman. As President & CEO of Linscomb & Williams, Phillip P. Hamman maintains ultimate responsibility for the advisory activities of the firm. Mr. Hamman discusses investment decisions and operational matters with the other senior personnel of the firm and the Executive Committee. Mr. Hamman and other senior personnel can be reached at 713-840-1000.

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This brochure supplement is provided on our employee, William “Bill” Kring, along with the following contact information:

William “Bill” Kring, Senior Wealth Advisor
Linscomb & Williams, Inc.
2727 Paces Ferry Road SE, Building Two, Suite 1475
Atlanta, GA 30339
bkring@linscomb-williams.com
770.333.0113 x106

March 22, 2023

This brochure supplement provides information about Bill Kring that supplements our Form ADV, Part 2A (attached). You should have received a copy of that brochure as we include this supplement with all copies. Please contact Bill Kring if you did not receive our brochure or if you have any questions about the contents of this supplement.

Educational Background and Business Experience

WILLIAM “BILL” KRING is a Senior Wealth Advisor with Linscomb & Williams (L&W). Prior to joining L&W, he worked at Wealth & Pension Services (and one of its predecessor firms, Kring Financial Management) since 1994. L&W acquired Wealth & Pension Services in 2019. He graduated from the Kelly School of Business at Indiana University with a Bachelor of Science degree in business. He is a member of the Financial Planning Association (FPA) and has previously served as President of the Institute of Certified Financial Planners – Georgia Society and was the past Chairman of the Financial Planning Association – Georgia. Bill has served as a Technical Editor for the *Journal of Financial Planning* and *Financial Planning Perspectives*. Bill is a CERTIFIED FINANCIAL PLANNER™ professional. Bill was born in 1963. See the Appendix at the end of this Supplement for an explanation of the qualifications required for each professional designation.

Disciplinary Information – None

Other Business Activities – None

Additional Compensation – None

Supervision

Mr. Kring’s advisory activities are supervised by MaryJane LeCroy, Wealth Advisor Team Lead in Atlanta, Georgia. Ms. LeCroy can be reached at 770-333-0113 x106. Additionally, as President & CEO of Linscomb & Williams, Phillip P. Hamman maintains ultimate responsibility for the advisory activities of the firm. Mr. Hamman discusses investment decisions and operational matters with the other senior personnel of the firm and the Executive Committee. Mr. Hamman and other senior personnel can be reached at 713-840-1000.

Part 2B of Form ADV: Brochure Supplement Appendix

This brochure supplement is provided on our employee, Sheri E. Robinson, along with the following contact information:

Sheri E. Robinson, Senior Wealth Advisor
Linscomb & Williams, Inc.
2100 3rd Avenue North, Suite 1100
Birmingham, AL 35203
srobinson@linscomb-williams.com
205-913-2448

March 22, 2023

This brochure supplement provides information about Sheri E. Robinson that supplements our Form ADV, Part 2A (attached). You should have received a copy of that brochure as we include this supplement with all copies. Please contact Sheri E. Robinson if you did not receive our brochure or if you have any questions about the contents of this supplement.

Educational Background and Business Experience

SHERI E. ROBINSON is a Senior Wealth Advisor with Linscomb & Williams (L&W) and has served in this role since 2013. Prior to joining L&W, Sheri was a Senior Wealth Advisor and Wealth Advisor working with BBVA Compass from 2007 to 2013. She graduated from the University of Alabama at Birmingham with a degree in accounting. She is a member of the Financial Planning Association (FPA) and has held various leadership positions on a national level as well as past president of the North Alabama Chapter of the FPA. She is a member of the Alabama Society of Certified Public Accountants and the Estate Planning Council of Birmingham. Sheri has been active on boards and committees of several non-profit organizations, most recently the YWCA of Central Alabama and the Alabama Ballet. She currently serves as board member and Treasurer for YouthServe Birmingham and is a member of the Executive Committee for the University of Alabama Alumni Board. She is a Certified Public Accountant (CPA), a CERTIFIED FINANCIAL PLANNER™ professional, and holds the Accredited Estate Planner® (AEP®) designation. Sheri was born in 1967. See the Appendix at the end of this Supplement for an explanation of the qualifications required for each professional designation.

Disciplinary Information - None

Other Business Activities - None

Additional Compensation – None

Supervision

Ms. Robinson's advisory activities are supervised by Phillip P. Hamman. As President & CEO of Linscomb & Williams, Phillip P. Hamman maintains ultimate responsibility for the advisory activities of the firm. Mr. Hamman discusses investment decisions and operational matters with the other senior personnel of the firm and the Executive Committee. Mr. Hamman and other senior personnel can be reached at 713-840-1000.

Part 2B of Form ADV: Brochure Supplement Appendix

This brochure supplement is provided on our employee, Melissa Barkley, along with the following contact information:

Melissa Barkley, Wealth Advisor
Linscomb & Williams, Inc.
2100 3rd Avenue North, Suite 1100
Birmingham, AL 35203
mbarkley@linscomb-williams.com
205-913-2448

March 22, 2023

This brochure supplement provides information about Melissa Barkley that supplements our Form ADV, Part 2A (attached). You should have received a copy of that brochure as we include this supplement with all copies. Please contact Melissa Barkley if you did not receive our brochure or if you have any questions about the contents of this supplement.

Educational Background and Business Experience

MELISSA BARKLEY is a Wealth Advisor with Linscomb & Williams (L&W) since 2023 and previously served as a Senior Analyst at the firm. Prior to joining L&W in 2014, Melissa was a Financial Planner with AmSouth Bank from 2002 to 2006. She also worked part time at BBVA Wealth Solutions from 2007 to 2011. Melissa graduated *cum laude* from Tufts University in Boston, MA, in 2002 with a degree in economics and a degree in history (*magna cum laude*). She holds membership in the Financial Planning Association (FPA). Melissa is a CERTIFIED FINANCIAL PLANNER™ professional. She was born in 1981. See the Appendix at the end of this Supplement for an explanation of the qualifications required for each professional designation.

Disciplinary Information - None

Other Business Activities - None

Additional Compensation – None

Supervision

Ms. Barkley's advisory activities are supervised by Sheri Robinson, Wealth Advisor Team Lead in Birmingham, Alabama. Ms. Robinson can be reached directly at 205-868-3331. Additionally, as President & CEO of Linscomb & Williams, Phillip P. Hamman maintains ultimate responsibility for the advisory activities of the firm. Mr. Hamman discusses investment decisions and operational matters with the other senior personnel of the firm and the Executive Committee. Mr. Hamman and other senior personnel can be reached at 713-840-1000.

Part 2B of Form ADV: Brochure Supplement Appendix

This brochure supplement is provided on our employee, Chris H. Russell, along with the following contact information:

Chris H. Russell, Wealth Advisor
Linscomb & Williams, Inc.
312 Clinton Avenue West
Huntsville, AL 35801
crussell@linscomb-williams.com
256-214-9713

March 22, 2023

This brochure supplement provides information about Chris H. Russell that supplements our Form ADV, Part 2A (attached). You should have received a copy of that brochure as we include this supplement with all copies. Please contact Chris Russell if you did not receive our brochure or if you have any questions about the contents of this supplement.

Educational Background and Business Experience

CHRIS H. RUSSELL is a Wealth Advisor at Linscomb & Williams (L&W) and has served in this role since 2021. Prior to joining L&W, he worked as a Wealth Manager and Private Banker with Cadence Bank from 2013-2021. Chris also worked in similar capacities at Wells Fargo Bank and Morgan Stanley. He graduated with a Bachelor of Science degree in business from Auburn University. Chris was the Founding Chairperson of the Board of Directors for the Community Foundation of Greater Huntsville. Chris has served on many Boards, including serving as Chair for Leadership Greater Huntsville. He received the Distinguished Leadership Award by the national Association of Leadership Programs. Chris currently serves on the Boards of the HudsonAlpha Foundation and the Huntsville/Madison County Chamber of Commerce. He was born in 1966. See the Appendix at the end of this Supplement for an explanation of the qualifications required for each professional designation.

Disciplinary Information – One regulatory disclosure DRP on file in connection with FINRA settlement in 2017 prior to his employment with L&W in 2021.

Other Business Activities - None

Additional Compensation – None

Supervision

Mr. Russell's advisory activities are supervised by Sheri Robinson, Wealth Advisor Team Lead in Birmingham, Alabama. Ms. Robinson can be reached directly at 205-868-3331. Additionally, as President & CEO of Linscomb & Williams, Phillip P. Hamman maintains ultimate responsibility for the advisory activities of the firm. Mr. Hamman discusses investment decisions and operational matters with the other senior personnel of the firm and the Executive Committee. Mr. Hamman and other senior personnel can be reached at 713-840-1000.

Part 2B of Form ADV: Brochure Supplement Appendix

This brochure supplement is provided on our employee, Brooke Jackson, along with the following contact information:

Brooke Jackson, Wealth Planning Manager
Linscomb & Williams, Inc.
1333 West Loop South, Suite 1500, Houston, TX 77027
bjackson@linscomb-williams.com
713-840-1000

March 22, 2023

This brochure supplement provides information about Brooke Jackson that supplements our Form ADV, Part 2A (attached). You should have received a copy of that brochure as we include this supplement with all copies. Please contact Brooke Jackson if you did not receive our brochure or if you have any questions about the contents of this supplement.

Educational Background and Business Experience

BROOKE JACKSON serves as the Wealth Planning Manager for Linscomb & Williams (L&W). Prior to joining L&W, Brooke was an Assistant Planner at a Houston-based financial services firm. Brooke graduated from Texas Tech University in 2015 with a bachelor's degree in personal financial planning. She holds a membership in the Financial Planning Association of Houston. Brooke is a CERTIFIED FINANCIAL PLANNER™ professional. She was born in 1994. See the Appendix at the end of this Supplement for an explanation of the qualifications required for each professional designation.

Disciplinary Information - None

Other Business Activities - None

Additional Compensation – None

Supervision

Ms. Jackson's advisory activities are supervised by Phillip P. Hamman. As President & CEO of Linscomb & Williams, Phillip P. Hamman maintains ultimate responsibility for the advisory activities of the firm. Mr. Hamman discusses investment decisions and operational matters with the other senior personnel of the firm and the Executive Committee. Mr. Hamman and other senior personnel can be reached at 713-840-1000.

Part 2B of Form ADV: Brochure Supplement Appendix

This brochure supplement is provided on our employee, Irving Reyna, along with the following contact information:

Irving Reyna, Senior Fixed Income Analyst
Linscomb & Williams, Inc.
1333 West Loop South, Suite 1500, Houston, TX 77027
ireyna@linscomb-williams.com
713-840-1000

March 22, 2023

This brochure supplement provides information about Irving Reyna that supplements our Form ADV, Part 2A (attached). You should have received a copy of that brochure as we include this supplement with all copies. Please contact Irving Reyna if you did not receive our brochure or if you have any questions about the contents of this supplement.

Educational Background and Business Experience

IRVING REYNA is a Senior Fixed Income Analyst and Trader at Linscomb & Williams (L&W) and has served in this role since 2018. Prior to joining L&W, he worked as a Registered Investment Associate at Royal Bank of Canada (RBC) since 2016. Irving also worked in similar capacities at Southwest Securities. He graduated with a Bachelor of Business Administration degree in finance from The University of Texas at San Antonio. He was born in 1989.

Disciplinary Information – None

Other Business Activities - None

Additional Compensation – None

Supervision

Mr. Reyna's investment advisory activities are supervised by Ryan Patterson, Chief Investment Officer. Additionally, as President & CEO of Linscomb & Williams, Phillip P. Hamman maintains ultimate responsibility for the advisory activities of the firm. Mr. Hamman discusses investment decisions and operational matters with the other senior personnel of the firm and the Executive Committee. Mr. Patterson, Mr. Hamman and other senior personnel can be reached at 713-840-1000.

Part 2B of Form ADV: Brochure Supplement Appendix

This brochure supplement is provided on our employee, Nick Bare along with the following contact information:

Nick Bare, Aspire Manager
Linscomb & Williams, Inc.
2727 Paces Ferry Road SE, Building Two, Suite 1475
Atlanta, GA 30339
nbare@linscomb-williams.com
770.333.0113

March 22, 2023

This brochure supplement provides information about Nick Bare that supplements our Form ADV, Part 2A (attached). You should have received a copy of that brochure as we include this supplement with all copies. Please contact Nick Bare if you did not receive our brochure or if you have any questions about the contents of this supplement.

Educational Background and Business Experience

NICK BARE is a Manager for Linscomb & Williams' (L&W) Aspire business and has served in this role since May 2022. Prior to becoming Aspire Manager, Nick served as a Wealth Advisor and a Financial Planner since joining the firm in January 2019. Nick is a CERTIFIED FINANCIAL PLANNER™ professional. Prior to joining L&W, he was a Regional Sales Manager for an electronics manufacturer. He holds a Bachelor of Science degree in Industrial Engineering Technology and a minor in Business Administration from Southern Polytechnic State University (now Kennesaw State University). Nick was born in 1991. See the Appendix at the end of this Supplement for an explanation of the qualifications required for each professional designation.

Disciplinary Information – None

Other Business Activities – None

Additional Compensation – None

Supervision

Mr. Bare's advisory activities are supervised by MaryJane LeCroy, Wealth Advisor Team Lead in Atlanta, Georgia. Ms. LeCroy can be reached at 770-333-0113 x106. Additionally, as President & CEO of Linscomb & Williams, Phillip P. Hamman maintains ultimate responsibility for the advisory activities of the firm. Mr. Hamman discusses investment decisions and operational matters with the other senior personnel of the firm. Mr. Hamman and other senior personnel can be reached at 713-840-1000.

Part 2B of Form ADV: Brochure Supplement Appendix

This brochure supplement is provided on our employee, Abby E. Barnett along with the following contact information:

Abby E. Barnett, Senior Wealth Specialist
Linscomb & Williams, Inc.
1333 West Loop South, Suite 1500, Houston, TX 77027
abarnett@linscomb-williams.com
713.840.1000

March 22, 2023

This brochure supplement provides information about Abby Barnett that supplements our Form ADV, Part 2A (attached). You should have received a copy of that brochure as we include this supplement with all copies. Please contact Abby Barnett if you did not receive our brochure or if you have any questions about the contents of this supplement.

Educational Background and Business Experience

ABBY E. BARNETT is a Senior Wealth Specialist with Linscomb & Williams (L&W) and has served in this role since July 2021. Prior to joining L&W, she was a Client Advisory Associate at Avalon Advisory from 2019 to 2021. She also worked for BBVA Compass from 2015 to 2019 in various roles. She holds a Bachelor of Business Administration degree in marketing from Texas Tech University. Abby is an active member of the Junior League of Houston. Abby was born in 1990. See the Appendix at the end of this Supplement for an explanation of the qualifications required for each professional designation.

Disciplinary Information – None

Other Business Activities – None

Additional Compensation – None

Supervision

Ms. Barnett's advisory activities are supervised by Nick Bare, Aspire Manager. Mr. Bare can be reached at 770-333-0113. Additionally, as President & CEO of Linscomb & Williams, Phillip P. Hamman maintains ultimate responsibility for the advisory activities of the firm. Mr. Hamman discusses investment decisions and operational matters with the other senior personnel of the firm and the Executive Committee. Mr. Hamman and other senior personnel can be reached at 713-840-1000.

Part 2B of Form ADV: Brochure Supplement Appendix

This brochure supplement is provided on our employee, Hernaldo Rivera along with the following contact information:

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Linscomb & Williams, Inc.
1333 West Loop South, Suite 1500, Houston, TX 77027
hrivera@linscomb-williams.com
713.840.1000

March 22, 2023

This brochure supplement provides information about Hernaldo Rivera that supplements our Form ADV, Part 2A (attached). You should have received a copy of that brochure as we include this supplement with all copies. Please contact Hernaldo Rivera if you did not receive our brochure or if you have any questions about the contents of this supplement.

Educational Background and Business Experience

HERNALDO RIVERA is a Business Development Manager with Linscomb & Williams (L&W) since joining the firm in January 2023. Prior to joining L&W, Hernaldo worked for Yorktown Funds from 2014-2023 where he was responsible for building brand awareness and sales within Texas and Southeast territories. From 2009-2014, he served as a regional director of sales at BNY Mellon/Dreyfus Funds educating financial advisors investment capabilities. He holds a Bachelor of Science degree in Economics and minor in Finance from the University of Houston. Hernaldo was born in 1973. See the Appendix at the end of this Supplement for an explanation of the qualifications required for each professional designation.

Disciplinary Information – None

Other Business Activities – None

Additional Compensation – None

Supervision

Mr. Rivera's activities are supervised by Phillip P. Hamman. As President & CEO of Linscomb & Williams, Phillip P. Hamman maintains ultimate responsibility for the advisory activities of the firm. Mr. Hamman discusses investment decisions and operational matters with the other senior personnel of the firm and the Executive Committee. Mr. Hamman and other senior personnel can be reached at 713-840-1000.

Part 2B of Form ADV: Brochure Supplement Appendix

Professional Designation Qualifications

The CPA designation is issued by the Texas State Board of Public Accountancy. To earn the credential, each candidate must have a bachelor's degree (or higher) from an accredited college or university and a required number of hours of accounting, business and ethics courses. In addition, candidates must pass the CPA examination and obtain qualifying work experience. Every three years, a CPA must complete a minimum of 120 hours of continuing education. More information regarding the CPA can be found at www.tsbpa.state.tx.us

The PFS designation is issued by the American Institute of Certified Public Accountants (AICPA). To earn the credential, each PFS candidate must have 80 hours of personal financial planning education, be a member of the AICPA, hold a CPA certificate issued by a state authority, and have at least two years of full-time personal financial planning experience. In addition, candidates must take the Final Certification examination. Every three years, a PFS must complete a minimum of 60 hours of continuing education. More information regarding the PFS can be found at www.aicpa.org

The CFP® designation is issued by the Certified Financial Planner Board of Standards, Inc. To earn the credential, each candidate must have a bachelor's degree (or higher) from an accredited college or university and three years of full-time personal financial planning experience. In addition, candidates must take the CFP® Certification examination and complete a CFP-board registered program or hold an accepted designation, degree or license. Every two years, a CFP® practitioner must complete a minimum of 30 hours of continuing education. More information regarding the CFP® designation can be found at www.cfp.net

The CLU designation is issued by the American College. To earn the credential, each CLU candidate must complete 5 core and 3 elective courses, and have at least three years of full-time business experience. Every two years, a CLU must complete a minimum of 30 hours of continuing education. More information regarding the CLU can be found at www.theamericancollege.edu

The ChFC designation is issued by the American College. To earn the credential, each candidate must complete 6 core and 2 elective courses, and have at least three years of full-time business experience. Every two years, a CLU must complete a minimum of 30 hours of continuing education. More information regarding the ChFC can be found at www.theamericancollege.edu

The CFA® designation is issued by the CFA® Institute. To earn the credential, each candidate must have a college degree or a combination of college and full-time work experience of four years. In addition, a candidate must complete a self-study program and pass three examinations. More information regarding the CFA® designation can be found at www.cfainstitute.org

The AEP® designation is issued by the National Association of Estate Planners & Councils. To earn the credential, each candidate must be an attorney, or hold the CLU, ChFC, or CFP® designations, or be a trust officer (CTFA); be in good standing with the professional organization and not subject to a disciplinary investigation, and have a minimum of 5 years' experience in estate planning in one or more of the prerequisite professions. Each candidate must also complete 2 graduate level courses with a final exam administered by The American College or from another accredited graduate program as part of a master's or doctoral degree unless candidate has 15 or more years' experience as an estate planner. Every 2 years an AEP® must complete a minimum of 30 hours of continuing education that includes at least 15 hours in estate planning. More information can be found at www.naepc.org

The CPWA® designation is issued by the Investments & Wealth Institute™. To earn the credential, each candidate must have a bachelor's degree or higher from an accredited college or university or an approved financial services industry professional designation, a satisfactory record of ethical conduct, and 5 years of professional client service experience in the financial services industry. In addition, a candidate must complete a six-month pre-study education component and final examination. More information can be found at www.imca.org

The CGMA designation is issued by the American Institute of Certified Public Accountants. To earn the credential, candidates must be members of either the AICPA or CIMA organizations and are required to pass the same capstone examination in order to become CGMA designation holders. More information can be found at www.cgma.org