

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

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

J. Harold Williams, Chairman  
Linscomb & Williams, Inc.  
1333 West Loop South, Suite 1500, Houston, TX 77027  
[hwilliams@linscomb-williams.com](mailto:hwilliams@linscomb-williams.com)  
713-840-1000

June 15, 2022

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

### **Educational Background and Business Experience**

**J. HAROLD WILLIAMS** is the Chairman and Managing Director of Linscomb & Williams (L&W) and has served in this capacity for 10 years. He has been a Wealth Advisor with L&W since 1976. Prior to joining L&W, Harold practiced accounting with a national public accounting firm (subsequently combined into the present-day organization known as Deloitte), specializing in audit and taxation. He also served as an officer in the U.S. Army Reserve from 1975 to 1982. Harold graduated Summa Cum Laude from the University of Houston with a degree in accounting, and he has lectured in accounting and finance and held memberships in Phi Kappa Phi, Beta Gamma Sigma, American Institute of Certified Public Accountants and Texas Society of Certified Public Accountants. He has served as a member of the Investment Advisory Board for the South Texas College of Law Endowment and the Cadence Bank Trust Investment Committee. Harold is a Certified Public Accountant (CPA), a Personal Financial Specialist (PFS) and a CERTIFIED FINANCIAL PLANNER™ professional. Harold was born in 1952. 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 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*

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

G. Walter Christopherson, Vice Chairman  
Linscomb & Williams, Inc.  
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[wchristopherson@linscomb-williams.com](mailto:wchristopherson@linscomb-williams.com)  
713-840-1000

June 15, 2022

*This brochure supplement provides information about G. Walter Christopherson that supplements our Form ADV, Part 2 (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 Vice Chairman and Managing Director of Linscomb & Williams (L&W) and Chairman of the Investment Committee and has served in this capacity for 6 years, prior to which time, he served as Chief Investment Officer. 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 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*

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This brochure supplement is provided on our employee, George F. Williams, along with the following contact information:

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713-840-1000

June 15, 2022

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

### **Educational Background and Business Experience**

**GEORGE F. WILLIAMS** is a Senior Wealth Advisor of Linscomb & Williams (L&W). He is one of the original founders of the firm and has served as a Wealth Advisor since 1971. He earned his business degree and law degree (JD) from the University of Houston. George has held memberships in the Order of the Barons, National Fee Insurance Alliance, Houston Estate & Financial Forum, Houston Business & Estate Planning Council and State Bar of Texas. George is a CERTIFIED FINANCIAL PLANNER™ professional. George was born in 1947. 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 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*

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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  
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[cgalfione@linscomb-williams.com](mailto:cgalfione@linscomb-williams.com)  
713-840-1000

June 15, 2022

*This brochure supplement provides information about Carolyn A. Galfione that supplements our Form ADV, Part 2 (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 of 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 since joining 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**

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

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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](mailto:efullerton@linscomb-williams.com)  
713-840-1000

June 15, 2022

*This brochure supplement provides information about Edward R. Fullerton that supplements our Form ADV, Part 2 (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, TX. 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 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.

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](mailto:hdavis@linscomb-williams.com)  
713-840-1000

June 15, 2022

*This brochure supplement provides information about Heidi L. Davis that supplements our Form ADV, Part 2 (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 at 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, 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. 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 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*

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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 3<sup>rd</sup> Avenue North, Suite 1100  
Birmingham, AL 35203  
[srobinson@linscomb-williams.com](mailto:srobinson@linscomb-williams.com)  
205-913-2448

June 15, 2022

*This brochure supplement provides information about Sheri E. Robinson that supplements our Form ADV, Part 2 (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 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 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**

As 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*

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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](mailto:phamman@linscomb-williams.com)  
713-840-1000

June 15, 2022

*This brochure supplement provides information about Phillip P. Hamman that supplements our Form ADV, Part 2 (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 and Managing Director of Linscomb & Williams (L&W) and has served in this capacity since June 2022. He served as President of Linscomb since 2018 and has served as Managing Director since January 2014. 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 April 2009 to April 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 worked for Kanaly Trust Company in Houston from August 2001 to April 2009. Phillip served in multiple roles while at Kanaly. He began his career as a financial planner, and he was serving as a Senior Wealth Advisor for the firm before joining Tolleson in April 2009. Phillip graduated from Texas Tech University with a B.S. in Personal Financial Planning. Phillip is a member of the CFA<sup>®</sup> Institute, Financial Planning Association, and the Investments & Wealth Institute<sup>™</sup>. He is a CFA<sup>®</sup> charterholder, Certified Private Wealth Advisor<sup>®</sup> professional and a CERTIFIED FINANCIAL PLANNER<sup>™</sup> 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**

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

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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.  
1333 West Loop South, Suite 1500, Houston, TX 77027  
[rpatterson@linscomb-williams.com](mailto:rpatterson@linscomb-williams.com)  
713-840-1000

June 15, 2022

*This brochure supplement provides information about Ryan L. Patterson that supplements our Form ADV, Part 2 (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 and Managing Director of Linscomb & Williams (L&W) and has served in this capacity since March 2014. He served as a Wealth Advisor from January 2012, to February 2014, with the firm. 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 B.B.A. in Finance. He is a member of the Financial Planning Association 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**

As 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*

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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](mailto:ttaylor@linscomb-williams.com)  
713-840-1000

June 15, 2022

*This brochure supplement provides information about Troy W. Taylor that supplements our Form ADV, Part 2 (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**

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

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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](mailto:civy@linscomb-williams.com)  
713-840-1000

June 15, 2022

*This brochure supplement provides information about B. Craig Ivy that supplements our Form ADV, Part 2 (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**

As 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.

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

Lauren J. Rich, Wealth Advisor  
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713-840-1000

June 15, 2022

*This brochure supplement provides information about Lauren J. Rich that supplements our Form ADV, Part 2 (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's in Business Administration 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**

As 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*

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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  
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713-840-1000

June 15, 2022

*This brochure supplement provides information about Jessica N. Banitt that supplements our Form ADV, Part 2 (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 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**

As 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.

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.  
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713-840-1000

June 15, 2022

*This brochure supplement provides information about Nick Ibanez that supplements our Form ADV, Part 2 (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**

As 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*

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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  
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[mlecroy@linscomb-williams.com](mailto:mlecroy@linscomb-williams.com)  
770-333-0113 x111

June 15, 2022

*This brochure supplement provides information about MaryJane M. LeCroy that supplements our Form ADV, Part 2 (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 has been with Wealth & Pension Services (and one of its predecessor firms, Hammond Financial Planning Corporation) since 2001. She graduated from Auburn University with a degree in business administration. She has held memberships in the Financial Planning Association and the Estate Planning Council of North Georgia. MaryJane currently serves as the Financial Treasurer of her church. 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**

As 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*

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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  
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[bkring@linscomb-williams.com](mailto:bkring@linscomb-williams.com)  
770-333-0113 x106

June 15, 2022

*This brochure supplement provides information about Bill Kring that supplements our Form ADV, Part 2 (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. He graduated from the Kelly School of Business at Indiana University with a B.S. degree in Business. He is a member of the Financial Planning Association 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**

As 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.

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

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713-840-1000

June 15, 2022

*This brochure supplement provides information about Ashley Trlica that supplements our Form ADV, Part 2 (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 Senior Analyst at Linscomb & Williams (L&W) and 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 B.B.A. 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**

As 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*

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

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June 15, 2022

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

### **Educational Background and Business Experience**

**LANTZ BOWMAN** is a Wealth Advisor since joining Linscomb & Williams (L&W) in September 2019. Prior to joining L&W, Lantz was a Senior Private Wealth Advisor at a Houston-based financial planning firm for 20 years. Lantz graduated from the Texas Tech University in 1999 with a degree in Family Financial Planning. Lantz is a CERTIFIED FINANCIAL PLANNER™ professional. He 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**

As 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*

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

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June 15, 2022

*This brochure supplement provides information about Brooke Jackson that supplements our Form ADV, Part 2 (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 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**

As 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*

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

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June 15, 2022

*This brochure supplement provides information about Melissa Barkley that supplements our Form ADV, Part 2 (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 Senior Analyst with Linscomb & Williams (L&W). Prior to joining L&W, Melissa was a Financial Planner with AmSouth Bank from December 2002 to December 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. 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**

As 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.

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

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June 15, 2022

*This brochure supplement provides information about Cole Wheeler that supplements our Form ADV, Part 2 (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** joined Linscomb & Williams (L&W) as a Financial Planner in January 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**

As 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*

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

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713-840-1000

June 15, 2022

*This brochure supplement provides information about Irving Reyna that supplements our Form ADV, Part 2 (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**

As 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*

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

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713-840-1000

June 15, 2022

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

### **Educational Background and Business Experience**

**GRANT J. WILLIAMS** is a Business Development Manager at Linscomb & Williams (L&W). Prior to joining L&W, Grant specialized in the placement of finance and technology professionals as a recruiting executive. This included several years serving a growing organization now known as VC5 Partners, a top agency in Houston, TX. Grant also owned and operated his own recruiting practice. Grant holds a B.A. in Psychology from Texas A&M University in College Station, TX. He volunteers regularly at First Presbyterian Church of Houston. Mr. Williams is a CERTIFIED FINANCIAL PLANNER™ professional. He 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**

As 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*

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

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June 15, 2022

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

### **Educational Background and Business Experience**

**LARRY E. NAPIER** is a Principal with Linscomb & Williams (L&W) and has served in this capacity for 12 years since opening a branch office for the firm in The Woodlands, Texas in 2010. Before joining L&W, Larry served as CFO of three U.S. companies in Oil and Gas Exploration & Production and Real Estate Development. Each of these U.S. Companies was wholly owned by foreign entities based in London England (Burmah Oil Co. 6-yrs), Oslo Norway (Saga Petroleum 8-yrs) and Athens Greece (Kriti Oil & Gas and Kriti Real Estate Development 23-yrs). Prior to that, Larry worked six years (1965-72) in accounting with Chevron Oil & Gas Company and Ernst & Ernst CPA (currently Ernst & Young) in New Orleans, Louisiana. During this same 6-year period in New Orleans, Larry also completed his 6-year military obligation by serving in the U.S. Army Reserve (MI detachment) as a military intelligent analyst with top secret clearances. Larry graduated from the University of Southern Mississippi with a degree in accounting and a minor in Business Administration. He has been a member of the American Institute of Certified Public Accountants, currently is a member of Texas Society of CPAs and has held positions as a board member and treasurer of a large not-for-profit Homeowners Association (HOA) and is currently a Director of The Woodlands Economic Development Partnership. He is a Certified Public Accountant (CPA) and holds a Series 65 license. Larry was born in 1945. 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 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*

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

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June 15, 2022

*This brochure supplement provides information about Chris H. Russell that supplements our Form ADV, Part 2 (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 since 2013. 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**

As 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*

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

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713-840-1000

June 15, 2022

*This brochure supplement provides information about Abby Barnett that supplements our Form ADV, Part 2 (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. Abby has a Series 66 license. She holds a bachelor's in Business Administration 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**

As 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

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### 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](http://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](http://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](http://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](http://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](http://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](http://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](http://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](http://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](http://www.cgma.org).