

Item 1 – Cover Page

McBryar Advisory Services, Inc.

Form ADV Part 2 — March 29, 2023

Address: 326 Courthouse Square
Bay Minette, AL 36507

Mailing: 326 Courthouse Square
Bay Minette, AL 36507

Telephone: (251) 285-0330

Email: operations@mcbryar.net

Website: www.mcbryar.net

This Brochure provides information about the qualifications and business practices of McBryar Advisory Services, Inc. If you have any questions about the contents of this Brochure, please contact us at (251) 285-0330 or by email at info@mcbryar.net. The information in this Brochure has not been approved or verified by the United States Securities and Exchange Commission or by any state securities authority.

Additional information about McBryar Advisory Services, Inc. is also available on the SEC's website at www.adviserinfo.sec.gov. You can search this site by a unique identifying number, known as a CRD number. The CRD number for McBryar Advisory Services, Inc. is 149871.

McBryar Advisory Services, Inc. is a registered investment adviser. Registration as an investment adviser does not imply any certain level of skill or training.

You may request the most recent version of this Brochure by contacting us as provided above.

Item 2 – Material Changes

This Brochure dated March 29, 2023, represents the annual amendment to the Brochure for McBryar Advisory Services, Inc.

Since the filing of the firm's annual update Brochure on March 25, 2022, subsequently amended June 28, 2022, and November 30, 2022, we have made various minor updates, but no material changes were made to the Brochure.

Pursuant to SEC Rules, we will deliver to you a summary of any material changes to this and subsequent Brochures within 120 days of the close of our fiscal year. We may further provide other ongoing disclosure information about material changes as necessary. All such information will be provided to you free of charge.

Currently, our Brochure may be requested by contacting us at (251) 285-0330. Additional information about AWS is also available via the SEC's web site www.adviserinfo.sec.gov. The SEC's web site also provides information about any persons affiliated with the firm who are registered as investment adviser representatives of the firm.

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Item 4 – Advisory Business

McBryar Advisory Services, Inc. provides investment advisory services to individuals, high net worth individuals, pension and profit sharing accounts, corporations and other business entities (collectively, “**Clients**”) by acting as co-adviser (“**Referrer**”) to Independent Registered Investment Advisor’s (“**Independent RIA’s**”) that have no affiliation with McBryar Advisory Services, Inc., such as Matson Money, Inc. The relationship between McBryar Advisory Services, Inc. as Referrer and Matson Money, Inc. as an Independent RIA, while primary, is not exclusive. However, the asset allocation vehicle offered to prospective clients is limited to the types of investments offered by Matson Money, Inc. and clients may not impose restrictions on investing in certain securities or types of securities.

McBryar Advisory Services, Inc. provides access to Fund Platforms offered by independent third parties by entering into a tri-party agreement between an Independent RIA, McBryar Advisory Services, Inc. as the Referrer, and the Client (as described above). Under this agreement the Independent RIA, provides the Client discretionary investment management services, whereas McBryar Advisory Services, Inc. provides nondiscretionary relationship services to the Client. This includes assisting in the initial selection of a model portfolio appropriate to the Clients investment objectives, risk tolerance and time horizon. McBryar Advisory Services is also responsible for ensuring that the Independent RIA, provide a suitable advisory program for the prospective Clients and accepts primary responsibility for counseling Clients with respect to monthly statements and the progress Clients are making towards their financial goals. As Referrer, we are required to maintain direct contact with the Clients, collect and periodically update Clients investment objectives, risk tolerance, financial situation, time horizon, current investments, and personal financial goals.

McBryar Advisory Services, Inc. also acts as a coach to our Clients and holds educational and informative opportunities for participating and prospective Clients based primarily on material and products provided by Matson Money. Clients are not charged a fee for these educational opportunities, materials and/or products described above.

McBryar Advisory Services, Inc. also offers its Clients access to the Matson Money Blue© service (web-based platform for the consolidation and maintenance of personal financial information). This data storage platform is provided through eMoney Advisor, LLC (“eMoney”) and access is granted to Referrers of Matson Money and their Clients. This single platform offers data aggregation, needs-based analysis, online document storage, and marketing communication tools. Clients of McBryar Advisory Services, Inc. who participate in the program have free access to their own data storage space with no increase in existing advisory fees. The Matson Money Blue© service is explained in further detail on pages 11-12 under item 11. This service is offered to Clients at the choice and expense of the IA Rep.

Because McBryar Advisory Services, Inc. is a registered investment adviser, we are required to meet certain fiduciary standards when providing investment advice to clients. Additionally, when we provide investment advice related to a retirement plan account or an individual retirement account, we are considered fiduciaries within the meaning of Title I of the Employee Retirement Income Security Act and/or the Internal Revenue Code, as applicable, which are laws governing retirement accounts. As such, we are required to act in your best interest and not put our interest ahead of yours, even though our compensation creates some conflicts with your interests in that the more you have us manage, the more we can earn. Our clients however are under no obligation to use services recommended by our associated

persons. Furthermore, we believe that our recommendations are in the best interests of our clients and are consistent with our clients' needs.

McBryar Advisory Services, Inc. has been operating as a registered investment adviser since 2009 and is owned by Roy E. McBryar.

Item 5 – Fees and Compensation

Clients of McBryar Advisory Services, Inc. that participate in Independent RIA Fund Platforms pay fees to Referrers (McBryar Advisory Services, Inc.) that are separate and apart from the fees and expenses associated with the Fund Platforms themselves. Referrer fees are collected by Independent RIA and remitted to the Referrer monthly or quarterly in advance in increments of one-twelfth or one-fourth the annual rate and are based upon the value of an account as of the last business day of each month or quarter period. However, when a Client contributes or withdraws assets from an account during the determination period, a portion of the fee is refunded to the account for withdrawals (on a prorated basis) or account for withdrawals to the account (on a prorated basis) or as contributions are made to the account, fees are charged (on a prorated basis) back to the date the contribution was received.

The Referrer fee collected by Matson Money and remitted to McBryar Advisory Services, Inc. is assessed at different levels and in different ways depending upon the program(s) in which the Client participates. The fees may range from 0.25% to 1.2% of Client assets under management based on the tri-party contract between the Independent RIA, McBryar Advisory Services, Inc. and the Client. The RIA Fund Platform (such as Matson Money) collects its fee through the fund's expense ratio, as detailed below.

It should be noted the above stated fees are separate and apart from the fees and expenses associated with the Independent RIA's Mutual Fund Asset Allocation Program. These fees and expenses are described in each fund's prospectus. These fees will generally include a management fee, other fund expenses, and a possible distribution fee. If the fund also imposes sales charges, a Client may pay an initial or deferred sales charge. A Client could invest in a mutual fund directly, without the services of the Independent RIA or McBryar Advisory Services, Inc. In that case, however, the Client would not receive the services provided by the Independent RIA or McBryar Advisory Services, Inc. which are designed, among other things, to assist the Client in determining which mutual fund or funds are most appropriate to each Client's financial condition and objectives. Accordingly, the Client should review the fees charged by the funds and the fees charged by the Independent RIA and McBryar Advisory Services, Inc. to fully understand the total amount of fees to be paid by the Client and to thereby evaluate the advisory services being provided. Additionally, the firm may incur brokerage and other transaction costs. Please refer to Item 12 below for further information about brokerage and transaction costs.

Item 6 – Performance Based Fees and Side-By-Side Management

McBryar Advisory Services, Inc. does not charge performance-based fees to any Clients, and consequently does not simultaneously manage performance based and non-performance based accounts.

Item 7 – Types of Client

As noted in Item 4, Clients of McBryar Advisory Services, Inc. include individuals, high net worth individuals, pension and profit-sharing accounts, corporations and/or other business entities.

Most of the Independent RIA's Fund Platforms have either waived or eliminated minimum investment requirements. The Matson Fund Platform, its Frontier Adjusted Portfolio Program and the Private Account Asset Allocation Platform have no minimum investment requirements. However, only existing clients of Matson Money, Inc.'s Private Account Asset Allocation Platform may open new accounts in that platform.

Item 8 – Methods of Analysis, Investment Strategies and Risk of Loss

The general investment strategy of McBryar Advisory Services, Inc., consistent with the tenets of modern portfolio theory, is to attempt to reduce risk and volatility by building globally diversified portfolios. To implement this strategy, the firm acts as co-adviser (Referrer) to the Independent RIA, a firm implementing a similar strategy. More specific information regarding methods of analysis, investment strategies, and risk of loss related to Independent RIA's can be found in the applicable Independent RIA's disclosure brochure which is available upon request.

Investing in securities under the aforementioned investment strategy involves risk of loss that Clients should be prepared to bear as a result of risks associated with particular issuers, market conditions, exchange rules, political developments, governmental intervention, currency fluctuations, natural disasters and other unpredictable events. These risks include fund of funds risk, investments in third party mutual funds or commingled investment vehicles, investing in exchange traded funds, and cyber-security risks. Additional information about the risks mentioned above (and others) can be found outlined in the Independent RIA's ADV Part 2 that was provided along with this brochure.

Clients are encouraged to review the prospectus of the Independent RIA's Funds for additional information regarding the risks associated with investing in the Funds, methods of analysis, sources of information and investment strategies.

Item 9 – Disciplinary Information

Investment advisers are required to disclose in this Brochure any legal or disciplinary events involving the firm or our officers or principals that would be considered material to the evaluation of our advisory business or the integrity of our management. We have no such information to report at this time.

Item 10 – Other Financial Industry Activities and Affiliations

Roy E. McBryar, CEO and Chief Compliance Officer of McBryar Advisory Services, Inc., is a licensed attorney and certified public accountant. However, Mr. McBryar devotes substantially all of his time to the duties of McBryar Advisory Services, Inc. and does not actively seek clients outside of these duties. Nevertheless, Mr. McBryar maintains a separate business under the name of R.E. McBryar, P.C., Attorney at Law should he receive a fee for legal services. The clients of McBryar Advisory Services, Inc., are not under any obligation to engage R.E. McBryar, P.C., Attorney at Law and conversely, no prior legal or accounting client of R.E. McBryar, P.C., Attorney at Law is obligated to use the advisory services provided by McBryar Advisory Services, Inc.

Also, as required by other licensing agencies, Mr. McBryar maintains a comprehensive system of checks and balances insuring there are no conflicts of interests between the various entities of which Mr. McBryar is involved.

McBryar Advisory Services, Inc. does not offer clients advice or recommendations related to insurance products. However, some associated persons of the firm are licensed insurance agents and may represent various insurance companies. Any insurance product placed through associated persons may generate standard and customary insurance commissions and other compensation, a portion of which may be received by associated persons of the firm.

While McBryar Advisory Services, Inc. will endeavor at all times to put the interest of clients first as part of its fiduciary duty, clients should be aware that the receipt of additional compensation creates a potential conflict of interest and may affect the judgment of individuals who make recommendations. However, our clients are under no obligation to purchase products recommended by our associated persons or to purchase products through our associated persons. We believe that our recommendations are in the best interests of our clients and are consistent with our clients' needs.

McBryar Advisory Services, Inc. does not participate in any other financial industry activities and has no other financial industry affiliations.

Item 11 – Code of Ethics, Participation or Interest in Client Transactions and Personal Trading

Code of Ethics and Personal Trading

We strive to adhere to the highest industry standards of conduct based on principles of professionalism, integrity, honesty and trust.

McBryar Advisory Services, Inc. has adopted Policies and Procedures to govern certain personal transactions by our principals and employees and to help ensure that the interests of our principals and employees do not conflict with the interest of our Clients. Our principals and employees are required to forward copies of all personal securities transaction confirmations as well as brokerage statements for every account in which they have a beneficial interest.

Our Policies and Procedures prohibit principals and employees from purchasing any initial public offerings or private placements. The companies Policies and Procedures, as they relate to Code of Conduct, are designed to emphasize that our principals and employees are in a position of trust with respect to our Clients. All personnel are required to comply with ethical restraints relating to Clients and their accounts, including restrictions on giving gifts to, and receiving gifts from, Clients in violation of our gift policy. Violations may result in demotion, suspension, firing, fines and other punishments. A copy of our Policies and Procedures is available to any Client or prospective client upon request. To request a copy, please contact us using the information provided on the cover page of this Brochure.

Item 12 – Brokerage Practices

McBryar Advisory Services, Inc. does not select broker dealers or custodians for clients. As stated in Item 4, McBryar Advisory Services, Inc. acts as co-adviser (Referrer) to Independent RIA's. In order to establish an advisory account with an Independent RIA, a client must first authorized a custodian and a broker-dealer acceptable to them. The Independent RIA will generally request that client's open custody accounts with a recommended Custodian or broker-dealers. Information regarding brokerage practices of Independent RIA's can be found in the applicable Independent RIA's disclosure brochure which is available upon request.

McBryar Advisory Services, Inc., does not use soft dollars to pay for any specific service or for any portion of “mixed use” items. McBryar Advisory Services, Inc. does not receive *client* referrals for recommending a specific broker-dealer. Clients are not permitted to select custodians and/or broker-dealers other than those offered by the Independent RIA’s.

Item 13 – Review of Accounts

McBryar Advisory Services, Inc. monitors Client accounts on an on-going basis. The Independent RIA reviews Client accounts at least quarterly, and more frequently if necessary. In addition to monitoring and reviewing Client accounts, the Independent RIA’s rebalances accounts by reallocating assets to original asset targets. Client accounts are then re-optimized when new asset category percentages are set.

Client reports are provided by the Independent RIA on a monthly or quarterly basis. The reports contain pricing and valuations based on best available data, noting that prices and values are not guaranteed. The reports also emphasize the importance of comparing Client reports with statements received from the qualified custodian holding Client assets. The reports may vary from custodian statements due to differences in transaction posting times, accounting procedures, or other reasons.

Item 14 – Client Referrals and Other Compensation

As disclosed in Item 4 and 5 above, McBryar Advisory Services, Inc. acts as co-adviser (Referrer) to the Independent RIA. Client fees received from an Independent RIA are assessed at different levels and in different ways depending upon the program(s) in which the Client participates and may range from 0.25% to 1.2% of Client assets under management. The fee arrangement is disclosed and agreed to in the tri-party contract (the Independent RIA, McBryar Advisory Services, Inc. and Client).

McBryar Advisory Services, Inc., does not currently compensate outside parties for client referrals.

Item 15 – Custody

McBryar Advisory Services, Inc. acts as co-adviser (Referrer) to the Independent RIA. McBryar Advisory Services, Inc., requires that client assets be held by a qualified custodian. Although neither McBryar Advisory Services, Inc. nor the Independent RIA will maintain possession of any Client assets, Clients may grant trading authority, the authority to deduct advisory fees from Client’s account, or authority to request disbursements (although various types of written authorizations are required depending on the type of disbursements).

Item 16 – Investment Discretion

As co-adviser (Referrer) to Independent RIA’s, McBryar Advisory Services, Inc. does not maintain any investment discretion for any of our clients. The Independent RIA assumes investment discretion authority though a tri-party contract provision entered into by each Client granting them a limited power of attorney for investment purposes.

Item 17 – Voting Client Securities

McBryar Advisory services, Inc. does not have authority to vote Client securities.

McBryar Advisory Services, Inc. acts as co-adviser (Referrer) to Independent RIA's. Clients are instructed to refer to the Independent RIA's written proxy voting policies and procedures as required by Advisers Act Rule 206(4)-6 for further information. Clients should direct questions about proxies they receive from their custodian to the Independent RIA managing the applicable account.

You may obtain a copy of each Independent RIA's written proxy voting policies and procedures, as well as information on how proxies were voted for your account. To request such information, please contact us using the information provided on the cover page of this Brochure. We will not disclose proxy votes for a Client to other Clients or to third parties unless specifically requested, in writing, by the Client, or as required to do so by applicable law or regulation.

Item 18 – Financial Information

Investment advisers and investment adviser representatives are required to provide certain financial information and or disclosures in this Brochure about their financial condition. For example, if the firm requires prepayment of fees for six months in advance, has custody of client funds, or has a condition that is reasonably likely to impair its ability to meet contractual commitments to clients, it must provide financial information and make disclosures. We have no such financial or operating conditions which trigger such additional reporting requirements.

Item 19 – Financial Information

Roy E. McBryar, the firm's majority owner, serves as the firm's Chief Executive Officer and Chief Compliance Officer. Further information can be found in Item 4 above and in the attached Part 2B Supplement.

State registered firms are required to make additional disclosures if a) the firm is compensated for advisory services with performance based fees, b) the firm or any of its management persons has been involved in certain types of arbitration, civil, or administrative claims, or c) the firm or any of its management persons has a relationship or arrangement with any issuer of securities. Neither the firm nor any of its management persons has any such arrangements, nor has been involved in any such actions, which require additional disclosures.

APPENDIX 1: Privacy Policy

McBryar Advisory Services, Inc. takes precautions — including administrative, technical, and physical measures — to safeguard personal information against loss, theft, and misuse, as well as unauthorized access, disclosure, alteration, and destruction. We restrict access to Client’s personal identifiable financial information (“Nonpublic Personal Information” or “NPI”) to employees who need to know that information in order to provide services to Account Owner. McBryar Advisory Services, Inc. also maintains physical, electronic, and procedural safeguards to protect Account Owners’ non-public personal information.

Commitment to Client Privacy

McBryar Advisory Services, Inc. does not sell any Client’s personal information to anyone. Nonpublic Personal Information is collected from Clients from the following sources:

- Account applications and other forms, which may include Client’s name, address, social security number, and information about the Client’s investment goals and risks tolerance;
- Clients professional advisors, such as a Client’s broker, financial planner, attorney, or accountant (an “Authorized Representative”), who may provide financial or investment history and tax information about the account;
- History of account(s), including information about transactions and balances in Client’s account;
- Correspondence, written or telephonic, between Client and Representative; or Client and employee of McBryar Advisory Services, Inc.

McBryar Advisory Services, Inc. does not disclose any Nonpublic Personal Information about the Client to any entity that is not an affiliate of, or related by common ownership or affiliated by corporate control (“Unaffiliated Third Party”) with, McBryar Advisory Services, Inc. except as permitted by law. Accordingly, McBryar Advisory Services, Inc. may disclose all of the information collected about the Client or the Client’s account as described above, under the following circumstances:

- McBryar Advisory Services, Inc. receives Client’s prior consent;
- McBryar Advisory Services, Inc. believes the recipient to be the Client’s Authorized Representative;
- The recipient is an Authorized Representative, custodian, or other service provider with whom we must share information in order to manage or service a Client’s account properly;
- McBryar Advisory Services, Inc. is required by law to release the information to the recipient.

McBryar Advisory Services, Inc. will only use information about the Client and the Client’s account to:

- service Client’s investment and financial needs;
- manage and service Client’s account

McBryar Advisory Services, Inc. will adhere to the practices described in this policy whether the Client is a current or non-current Client with McBryar Advisory Services, Inc.

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Roy E. McBryar
McBryar Advisory Services, Inc.

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www.mcbryar.net

Supplement to Form ADV Part 2 – November 30, 2022

This brochure supplement provides information about Roy E. McBryar that supplements the McBryar Advisory Services, Inc. brochure. You should have received a copy of that brochure. Please contact the firm’s Chief Compliance Officer if you did not receive the McBryar Advisory Services, Inc. brochure or if you have any questions about the contents of this supplement.

Additional information about Roy E. McBryar is available on the SEC’s website at www.adviserinfo.sec.gov.

Item 2 – Educational Background and Business Experience

Born: 1951

Education: 1980 B.S., Business Administration, Auburn University, Montgomery, AL
1992 Juris Doctor, Jones School of Law, Montgomery, AL

Business

Experience: 2020-Present CEO/Principal Officer of McBryar Advisory Services, Inc
2009-2020 President/Principal Officer of McBryar Advisory Services, Inc.
1993-2009 Roy E. McBryar, P.C., Attorney At Law, President
1986-1993 Roy E. McBryar, P.C., Certified Public Accountant, Owner

Licenses: Series 65 requirements administered by FINRA were waived by the State of Alabama Securities Commission under Commission Rule 830-X-3 08 (6), which allows the Commission to waive exam requirements for individuals holding certain professional designations.

1986 CPA (Certificate #3473) administered by Alabama State Board of Public Accountancy. CPAs are licensed and regulated by their state boards of accountancy. While state laws and regulations vary, the education, experience and testing requirements for licensure as a CPA generally include minimum college education (typically 150 credit hours with at least a baccalaureate degree and a concentration in accounting), minimum experience levels (most states require at least one year of experience providing services that involve the use of accounting, attest, compilation, management advisory, financial advisory, tax or consulting

skills, all of which must be achieved under the supervision of or verification by a CPA), and successful passage of the Uniform CPA Examination. In order to maintain a CPA license, states generally require the completion of 40 hours of continuing professional education (CPE) each year (or 80 hours over a two year period or 120 hours over a three year period). Additionally, all American Institute of Certified Public Accountants (AICPA) members are required to follow a rigorous Code of Professional Conduct which requires that they act with integrity, objectivity, due care, competence, fully disclose any conflicts of interest (and obtain client consent if a conflict exists), maintain client confidentiality, disclose to the client any commission or referral fees, and serve the public interest when providing financial services. The vast majority of state boards of accountancy have adopted the AICPA's Code of Professional Conduct within their state accountancy laws or have created their own.

1992

Attorney (Certificate #6686 C50R) administered by Alabama State Bar

Item 3 – Disciplinary Information

Investment adviser representatives are required to disclose in this Brochure any legal or disciplinary events that would be considered material to the evaluation of the representative. Roy E. McBryar has no information to report concerning legal or disciplinary events.

Item 4 – Other Business Activities

Roy E. McBryar, is a licensed attorney and certified public accountant. However, Mr. McBryar devotes substantially all of his time to the duties of McBryar Advisory Services, Inc. and does not actively seek clients outside of these duties. Nevertheless, Mr. McBryar maintains a separate business under the name of R. E. McBryar, P. C., Attorney At Law should he receive a fee for legal services. The clients of McBryar Advisory Services, Inc. are not under any obligation to engage R.E. McBryar, P.C., Attorney At Law and conversely, no prior legal or accounting client of R.E. McBryar, P.C., Attorney At Law is obligated to use the advisory services provided by McBryar Advisory Services, Inc.

Also, as required by state licensing agencies, Mr. McBryar maintains a comprehensive system of insuring there are no conflicts of interests between the various entities of which Mr. McBryar is involved.

Mr. McBryar has no other reportable business activities or financial industry affiliations.

Item 5 – Additional Compensation

Mr. McBryar does not receive any economic benefits, sales awards or compensation other than normal salary and bonuses in connection with providing advisory services to clients.

Item 6 – Supervision

As the CEO, Chief Compliance Officer, and principal officer of McBryar Advisory Services, Inc., Mr. McBryar is not subject to normal hierarchical supervision. However, Mr. McBryar's activities are subject to and abided by the firm's Policies and Procedures. Mr. McBryar can be contacted at (251) 285-0330.

Item 7 – Requirements for State-Registered Advisers

Form ADV Part 2 requires that the individual named to disclose certain legal, disciplinary, or financial events that would be considered material to the evaluation of the representative such as any of the following:

- arbitration claim(s) alleging damages in excess of \$2,500
- civil, self-regulatory organization, or administrative proceeding(s) –
- subject of bankruptcy petition(s)

Mr. McBryar is currently not subject to, nor has been subject to, any events of this nature.

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James R. Hollon
McBryar Advisory Services, Inc.

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www.mcbryar.net

Supplement to Form ADV Part 2 – March 29, 2023

This brochure supplement provides information about James R. Hollon that supplements the McBryar Advisory Services, Inc. brochure. You should have received a copy of that brochure. Please contact the firm’s Chief Compliance Officer if you did not receive the McBryar Advisory Services, Inc. brochure or if you have any questions about the contents of this supplement.

Additional information about James R. Hollon is available on the SEC’s website at www.adviserinfo.sec.gov.

Item 2 – Educational Background and Business Experience

Born: 1924

Education: 1949 Alabama Polytechnic Institute

Business

Experience: 1981-Present President of J.R. Hollon & Associates, Inc.

2009-Present Investment Adviser Representative, McBryar Advisory Services, Inc.

Item 3 – Disciplinary Information

Investment adviser representatives are required to disclose in this Brochure any legal or disciplinary events that would be considered material to the evaluation of the representative. James R. Hollon has no information to report concerning legal or disciplinary events.

Item 4 – Other Business Activities

James R. Hollon is the President of J.R. Hollon & Associates, Inc., an entity he uses for accounting and tax purposes. Mr. Hollon is separately licensed to provide various life, health, disability and long-term care insurance products offered by many competitive insurance companies. Mr. Hollon may receive the customary commissions paid in connection with insurance sales, however, our clients are under no obligation to purchase products recommended by our associated persons. The receipt of this compensation of course may give him an incentive to make recommendations based on his interest rather

than yours, which is a potential conflict of interest. However, Mr. Hollon is required to put his clients' interests above his.

Mr. Hollon has no other reportable business activities or financial industry affiliations.

Item 5 – Additional Compensation

James R. Hollon does not receive any economic benefits, sales awards or compensation other than normal salary and bonuses in connection with providing advisory services to clients.

Item 6 – Supervision

As an Investment Adviser Representative of McBryar Advisory Services, Inc., Mr. Hollon is subject to supervision by the firm's CEO and Chief Compliance Officer, Roy E. McBryar, who is generally responsible for monitoring the activities of all personnel. Mr. Hollon's activities are also subject to and abided by the firm's Policies and Procedures. Mr. McBryar can be contacted at (251) 285-0330.

Item 7 – Requirements for State-Registered Advisers

Form ADV Part 2 requires that the individual named in this brochure disclose of an award or otherwise being found liable in any of the following events:

- arbitration claim alleging damages in excess of \$2,500
- civil, self-regulatory organization, or administrative proceeding –
- subject of bankruptcy petition

Mr. Hollon has not been subject to, awarded, or otherwise found liable to any of the above events.

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Ben Harper
McBryar Advisory Services, Inc.

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Supplement to Form ADV Part 2 – March 29, 2023

This brochure supplement provides information about Ben Harper that supplements the McBryar Advisory Services, Inc. brochure. You should have received a copy of that brochure. Please contact the firm's Chief Compliance Officer if you did not receive the McBryar Advisory Services, Inc. brochure or if you have any questions about the contents of this supplement.

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

Item 2 – Educational Background and Business Experience

Born: 1974

Education: 1996 B.S., Business Administration, Auburn University

Business

<u>Experience:</u>	2020-Present	President of McBryar Advisory Services, Inc.
	2013-Present	Investment Adviser Representative, McBryar Advisory Services, Inc.
	2012-2013	Not Employed
	2009-2012	Senior Vice President-Recovery, Textron Financial Corp.
	2007-2009	Vice President-Operations, Textron Financial Corp.
	2006-2007	Certified Six Sigma Black Belt, Textron Financial Corp.
	2004-2006	Assistant Vice President-Credit, Textron Financial Corp.
	2003-2004	Portfolio Manager, Textron Financial Corp.

Licenses: 2013 Series 65 administered by FINRA to qualify candidates as investment adviser representatives

Item 3 – Disciplinary Information

Investment adviser representatives are required to disclose in this Brochure any legal or disciplinary events that would be considered material to the evaluation of the representative. Ben Harper has no information to report concerning legal or disciplinary events.

Item 4 – Other Business Activities

Ben Harper has no other reportable business activities or financial industry affiliations.

Item 5 – Additional Compensation

Ben Harper does not receive any economic benefits, sales awards or compensation other than normal salary and bonuses in connection with providing advisory services to clients.

Item 6 – Supervision

As President and Investment Adviser Representative of McBryar Advisory Services, Inc., Mr. Harper is subject to supervision by the firm's CEO and Chief Compliance Officer, Roy E. McBryar, who is generally responsible for monitoring the activities of all personnel. Mr. Harper's activities are also subject to and abided by the firm's Policies and Procedures. Mr. McBryar can be contacted at (251) 285-0330.

Item 7 – Requirements for State-Registered Advisers

Form ADV Part 2 requires that the individual named to disclose certain legal, disciplinary, or financial events that would be considered material to the evaluation of the representative such as any of the following:

- arbitration claim alleging damages in excess of \$2,500
- civil, self-regulatory organization, or administrative proceeding
- subject of bankruptcy petition

Mr. Harper is currently not subject to, nor has been subject to, any events of this nature.

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T. Phillip Webb McBryar Advisory Services, Inc.

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www.mcbryar.net

Supplement to Form ADV Part 2 – March 29, 2023

This brochure supplement provides information about T. Phillip Webb that supplements the McBryar Advisory Services, Inc. brochure. You should have received a copy of that brochure. Please contact the firm’s Chief Compliance Officer if you did not receive the McBryar Advisory Services, Inc. brochure or if you have any questions about the contents of this supplement.

Additional information about T. Phillip Webb is available on the SEC’s website www.adviserinfo.sec.gov.

Item 2 – Educational Background and Business Experience

Born: 1947

Education: B.S., Business Industrial Management & Finance

Business

Experience: 2018-Present Investment Adviser Representative, McBryar Advisory Services, Inc.
President, Webb Financial Strategies

2000-2018 Agent, Guardian Life Insurance Company

Investment Adviser Representative, Park Avenue Securities LLC

License: 2007 Series 65 administered by FINRA to qualify candidates as investment adviser representatives

1984 Series 63 administered by the Financial Industry Regulatory Authority to qualify candidates as broker dealer agents

Professional Designations:

Chartered Financial Consultant (ChFC)

A financial planning designation for the insurance industry awarded by the American College of Bryn Mawr. ChFC’s must meet experience requirements and pass exams covering finance and investing. They must have at least 3 years of experience in the financial industry, and have studied and passed an examination on the fundamentals of

financial planning, including income tax, insurance, investment and estate planning.

Chartered Life Underwriter (CLU)

The CLU designation is awarded to insurance and financial service professionals who have met 3 years of business experience (an undergraduate degree qualifies as 1 year of business experience), passed 8 college-level education courses and agreed to abide by a code of ethics. CLU's are required to undergo continuing education every 2 years.

Item 3 – Disciplinary Information

Investment adviser representatives are required to disclose in this Brochure any legal or disciplinary events that would be considered material to the evaluation of the representative. T. Phillip Webb has no information to report concerning legal or disciplinary events.

Item 4 – Other Business Activities

T. Phillip Webb provides investment coaching as well as financial, business, retirement and estate planning, which may include reviewing financial objectives, asset allocation, adequate amounts of insurance and cash flow management. The planning process may include insurance in addition to investment management. Mr. Webb is separately licensed and offers insurance products through Webb Financial Strategies, Inc. He is licensed to provide various life, health, disability and long-term care insurance products offered by many competitive insurance companies. Mr. Webb may receive the customary commissions paid in connection with insurance sales, however, our clients are under no obligation to purchase products recommended by our associated persons. The receipt of this compensation of course may give him an incentive to make recommendations based on his interest rather than yours, which is a potential conflict of interest. However, Mr. Webb always tries to put his clients interests above his and adheres to the Chartered Financial Consultants and Chartered Life underwriter code of ethics.

Mr. Webb has no other reportable business activities or financial industry affiliations.

Item 5 – Additional Compensation

T. Phillip Webb does not receive any economic benefits, sales awards or compensation other than normal salary and bonuses in connection with providing advisory services to clients.

Item 6 – Supervision

As an Investment Adviser Representative of McBryar Advisory Services, Inc., Mr. Webb is subject to supervision by the firm's CEO and Chief Compliance Officer, Roy E. McBryar, who is generally responsible for monitoring the activities of all personnel. Mr. Webb's activities are also subject to and abided by the firm's Policies and Procedures. Mr. McBryar can be contacted at (251) 285-0330.

Item 7 – Requirements for State Registered Advisers

Form ADV Part 2 requires that the individual named to disclose certain legal, disciplinary, or financial events that would be considered material to the evaluation of the representative such as any of the following:

- arbitration claim alleging damages in excess of \$2,500
- civil, self-regulatory organization, or administrative proceeding
- subject of bankruptcy petition

A summary of events for Mr. Webb is listed below:

- 09/30/2003 – Administrative order issued by Alabama Securities Commission resulting in civil and administrative penalties and restitution. Mr. Webb borrowed funds from a client and failed to execute trades.
- 01/24/2011 – Tax Lien/Judgement filed by IRS for \$298,108. Mr. Webb was unaware the judgement had been filed until 03/28/2016. Mr. Webb is currently working with the IRS and negotiating payment terms.
- 1994 – Chapter 7 bankruptcy related to personal guarantee of business debts.
- 1987 - Chapter 11 bankruptcy related to personal guarantee of business debts.

Item 1 – Cover Page

James M. Conner
McBryar Advisory Services, Inc.

Located at:
310 Paper Trail Way
Canton, GA 30115

Home Office:
326 Courthouse Square
Bay Minette, AL 36507
Telephone: (251) 285-0330
Email: operations@mcbryar.net

www.mcbryar.net

Supplement to Form ADV Part 2 – March 29, 2023

This brochure supplement provides information about James M. Conner that supplements the McBryar Advisory Services, Inc. brochure. You should have received a copy of that brochure. Please contact the firm’s Chief Compliance Officer if you did not receive the McBryar Advisory Services, Inc. brochure or if you have any questions about the contents of this supplement.

Additional information about James M. Conner is available on the SEC’s website at www.adviserinfo.sec.gov.

Item 2 – Educational Background and Business Experience

Born: 1957

Education: B.S., Business Administration/Marketing, University of Georgia

Business

<i><u>Experience:</u></i>	2022-Present	Investment Adviser Representative, McBryar Advisory Services, Inc.
	2021-2022	Concierge/Transportation, The Spires at Berry College
	2018-2021	Sr. Director of Strategic Alliances, DocASAP / UnitedHealth Group / Optum Technology
	2017-2018	Sr. Business Development Manager, M* Modal / 3M Corporation
	2011-2017	Regional Vice President, Allscripts

Item 3 – Disciplinary Information

Investment adviser representatives are required to disclose in this Brochure any legal or disciplinary events that would be considered material to the evaluation of the representative. James M. Conner has no information to report concerning legal or disciplinary events.

Item 4 – Other Business Activities

Mr. Conner has no other reportable business activities of financial industry affiliations.

Item 5 – Additional Compensation

James M. Conner does not receive any economic benefits, sales awards or compensation other than normal salary and bonuses in connection with providing advisory services to clients.

Item 6 – Supervision

As an Investment Adviser Representative of McBryar Advisory Services, Inc., Mr. Conner is subject to supervision by the firm's CEO and Chief Compliance Officer, Roy E. McBryar, who is generally responsible for monitoring the activities of all personnel. Mr. Conner's activities are also subject to and abided by the firm's Policies and Procedures. Mr. McBryar can be contacted at (251) 285-0330.

Item 7 – Requirements for State-Registered Advisers

Form ADV Part 2 requires that the individual named in this brochure disclose of an award or otherwise being found liable in any of the following events:

- arbitration claim alleging damages in excess of \$2,500
- civil, self-regulatory organization, or administrative proceeding –
- subject of bankruptcy petition

Mr. Conner has not been subject to, awarded, or otherwise found liable to any of the above events.