Form ADV: Part 2A Brochure

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This Brochure provides information about the qualifications and business practices of Reliant Investment Management, LLC. If you have any questions about the contents of this Brochure, please contact us at 1-800-880-3364 or info@reliantllc.com. 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.

Reliant Investment Management, LLC is a registered investment advisor. Registration of an Investment Advisor does not imply any level of skill or training. The oral and written communications of an Advisor provide you with information about which you would use for determining whether to hire or retain an Advisor. Additional information about Reliant Investment Management, LLC also is available on the SEC's website located at www.adviserinfo.sec.gov.

Item 2 – Material Changes

This Brochure is dated March 31, 2023 and is prepared according to SEC's requirements and rules.

There have been no material changes to the information contained in this Brochure since the last amendment of this Brochure dated July 31, 2022.

We will provide clients with a current Brochure, as necessary, based on changes or new information, at any time, without charge. Currently, our Brochure may be requested by contacting us at 1-800-880-3364.

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Item 4 – Advisory Business

RELIANT INVESTMENT MANAGEMENT, LLC (Reliant) is a registered investment adviser that was organized in 2001. The principal owners are Susan L. Huffman, John R. Huffman, and Lon M. Magness, who are each employed by the firm and are actively engaged in the business of the firm.

Reliant provides investment management and investment consulting services. While Reliant is not a financial planning firm, the investment management process does, however, include assessing a client's tolerance for risk and the impact of different portfolio structures on estimated future wealth and income.

The primary advisory service provided by Reliant (between 75% and 100%) is discretionary investment management, conducted within guidelines agreed upon between Reliant and each client. A portion of Reliant's business, approximately one percent (1%), is non-discretionary investment management. As of December 31, 2022, client assets managed on a discretionary basis were approximately $1,411,880,464 and client assets managed on a non-discretionary basis were approximately $11,111,079.

Reliant actively manages investment portfolios for its clients that generally consist of stocks, bonds, mutual funds and other investment securities. Reliant tailors the advisory services provided to the needs and objectives of each client. Services include setting asset allocation targets to determine the appropriate mix of stocks, bonds, reserves, and other asset classes, giving consideration to client needs and market conditions. Option and other strategies are also utilized by Reliant when appropriate. The trading of stocks and bonds is an integral part Reliant's investment management process. Client consultations are conducted on an ongoing basis to ensure that the client objectives are up-to-date. Clients may impose limitations on investing in certain securities or types of securities, which are administered on a case by case basis.

Reliant provides other account management services not involving investment supervisory services. This is similar to other management services, except that the interface with the client is handled by another investment professional such as a broker, a consultant, or a financial planning professional. The other investment professional works with the client to determine individual needs and objectives, and they are aware of the client's total portfolio, risk tolerance, and asset allocation. The investment professionals are familiar with Reliant and consider the firm's investment strategies to be an appropriate fit for the client. In such cases, Reliant often manages a portion of the client's total portfolio based on a specific mandate or in a manner consistent with instructions provided by the other investment professional.

Reliant also provides investment consulting services. This includes, for example, one-time portfolio evaluations, assisting clients in making choices on 401k plans, or other services utilizing the investment expertise of Reliant. This is a smaller proportion of Reliant's business and can vary from year to year. Reliant compensates third parties for the administrative services rendered by payment of a portion of the annual advisory fee paid to Reliant by the retirement plan. This arrangement has been disclosed to the clients.

Reliant participates in wrap fee programs by providing portfolio management services. Accounts managed under these programs are managed using the same strategies and methods used to manage other portfolios. For these relationships, the wrap fee program sponsors calculate and collect the fees from the clients. Reliant subsequently receives a portion of the total fee, or "wrap fee" for its services from the program sponsors.

Item 5 – Fees and Compensation

The specific manner in which fees are charged by Reliant is established in the client's written agreement with Reliant. Reliant is compensated primarily through a fee that is calculated as a percentage of client assets under management. On occasion, fees may be based on an hourly rate, especially if the service being provided is a project or specific engagement, rather than ongoing investment management. Under some circumstances, a fixed fee may be appropriate.

Client portfolios do incur additional fees and expenses in connection with Reliant's advisory services, such as fees charged by an independent custodian, or mutual fund expenses. Client portfolios will also incur brokerage and other transaction costs, as outlined in Item 12 of this document that discusses brokerage and trading practices.

Reliant's management fees are based on each client's assets under management. Fees are calculated, billed or deducted following the end of each calendar quarter, based on the month-end value of a client's assets. Clients may choose to have fees deducted from their account or receive invoices. Unless specifically instructed by a client, Reliant deducts its management fees directly from each client account. Reliant's fee schedule for discretionary, continuous investment management services is as follows:

STOCK MANAGEMENT	STOCK & BOND MANAGEMENT	BOND MANAGEMENT	CASH MANAGEMENT
1.00 %	0.75 %	0.50 %	0.25 %

Management fees for institutional and individual client assets with a market value in excess of $50 million are negotiable. Client fee schedules may be negotiated higher or lower under certain circumstances, including objectives not specified above. This will be evaluated on a case by case basis. Actual investment advisory fees incurred by clients may vary.

Special client projects pertaining to investment management may be undertaken on an hourly fee basis. These include, but are not limited to, one-time portfolio evaluations, advice about the allocation of 401k contributions, and investment performance evaluation for portfolios managed by others. The specific fee amount is negotiable, depending on the nature of the service.

The client fee agreement may be amended from time to time by Reliant upon thirty (30) days written notice to the client. If there is no month-end during the period, the prior month-end value will be the basis of the fee calculation.

Reliant's fee agreement with each client may be cancelled by either party upon written notice. Upon cancellation, the final fee will be based on the average month-end valuations that occurred during the quarter of termination, through the date of the termination notice.

Reliant bills and collects all management fees from clients in arrears, after the services have been performed. Clients do not pay fees in advance.

Reliant presently has certain clients under "wrap fee" arrangements offered by Raymond James Financial, a broker-dealer. The wrap fee is calculated as a percentage of client assets under management, and is paid to Raymond James Financial. A portion of the wrap fee paid to Raymond James Financial is received by Reliant for its investment management services. In evaluating such an arrangement, a client should recognize that brokerage commissions for the execution of transactions in the client's account are not negotiated by Reliant. Trades are generally expected to be executed only with Raymond James Financial, so that Reliant may not be able to seek best price and execution by placing transactions with other broker dealers. The client should also consider that, depending upon the level of the wrap fee charged by Raymond James Financial, the amount of portfolio activity in the client's account, the value of custodial and other services provided under the arrangement and other factors, the wrap fee may or may not exceed the aggregate cost of such services if they were to be obtained separately and if Reliant were able to negotiate commissions and thus seek best price and execution of transactions for the client's account. Programs similar to the one in place with Raymond James Financial may be undertaken with other broker-dealers. At present, no other such arrangements exist.

Reliant does not accept any compensation for the sale of securities or other investment products.

It should be noted that the investment advisory fees may be tax-deductible expenses, to the extent allowed by federal and state regulations.

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

Reliant does not accept or receive performance-based fees as compensation for investment advisory services provided to clients.

Item 7 – Types of Clients

Reliant provides investment advisory services to individuals, retirement plans, trusts, charitable and not-for-profit organizations, foundations, business entities, financial institutions, and governmental bodies.

Generally, Reliant will not accept a new account with a balance of less than $500,000. However, this requirement may be waived at Reliant's discretion.

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

Reliant uses a number of techniques for analyzing securities to formulate investment advice and manage assets. Foremost among these techniques are fundamental research, charting and technical analysis of price and trading volume, and economic analysis.

The firm primarily utilizes the following sources of information: internally generated research, research materials prepared by others, financial publications, and independent corporate rating services. Material provided directly by corporations is also used, including annual reports and prospectuses. In addition, Reliant has direct, electronic access to a wide array of research and analytical information.

During the research process and through other contacts, Reliant may become privy to material non-public information. Reliant employees who do possess such information shall not trade or cause others to trade in that security. If employees receive material non-public information in confidence, they shall not breach that confidence by trading or causing others to trade in securities to which such information relates.

The primary investment strategy used by Reliant is to purchase securities with the intent of holding them for at least a year. Securities will be purchased and sold within a shorter period of time when appropriate.

Reliant may utilize a variety of investment types in the management of various investment strategies. Investments may be owned long or sold short, as authorized by each client, and include the following:

- Common stocks (exchange traded and over-the-counter)
- Issues convertible into common stocks
- Bonds and debt securities (government, corporate, mortgage, asset-backed, tax-exempt)
- Options contracts on securities and commodities (puts and calls)
- Futures contracts (tangible and intangible) on securities and commodities
- Mutual Funds and Exchange Traded funds
- Money-market instruments (money-market funds, Treasury bills, commercial paper, certificates of deposit, repurchase agreements)
- Interests in partnerships, LLC's, or other vehicles owning real estate, or other assets

Those clients considering any investment program should be aware that investing in securities involves risks that the client should be prepared to bear.

Item 9 – Disciplinary Information

Registered investment advisors are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of Reliant or the integrity of Reliant's management. As such, Reliant has no history of any disciplinary action, and there are no known or pending legal or disciplinary events that would be considered material to a client's or prospective client's evaluation of Reliant's advisory business.

Item 10 – Other Financial Industry Activities and Affiliations

Neither Reliant nor its supervised persons have any other financial industry activities or affiliations that are material to its business.

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

Reliant has adopted a Code of Ethics and Standards of Professional Conduct for the purpose of instructing its personnel in their ethical obligations and to provide rules for their personal securities transactions. The Code of Ethics covers a range of topics that include general ethical principles; priority of trading and reporting of personal security transactions; participation in initial public offerings and private placements; relationships with clients, prospective clients, and the public; preservation of confidentiality; reporting of conflicts of interest; and supervisory procedures. A copy of the Reliant Code of Ethics and Standards of Professional Conduct will be provided to any client or prospective client upon request.

Reliant employees may buy or sell securities that are also bought or sold in client accounts. Transactions for clients have priority over employee transactions. Reliant maintains a basic commitment to always place client interests above those of the officers and employees of Reliant and their immediate family members. To protect the interests of its clients, and to limit potential conflicts of interest, Reliant maintains specific rules and practices governing the personal trading of its officers and employees, as follows:

- A security is defined to include all directly related securities, such as convertible issues, options and warrants.
- No employee may purchase or sell a security that is either being bought or sold for a client until the next trading day.
- No employee should purchase a security that may be purchased for a client or sell a security that may be sold for a client within one day prior to the client transaction. Though this standard is difficult to monitor precisely, the intent is clear and will be monitored on a case by case basis.
- No employee may purchase a security from or sell a security to a client.
- No employee may purchase a security on its initial public offering.
- All employee transactions will be recorded in a personal trading log on the date of transaction. Each employee will sign the record of transaction for the previous ninety (90) days.

Reliant does not, as principal, buy securities for itself from, or sell securities it owns to any client. Reliant also does not, as broker or agent, effect securities transactions for compensation for any client. However, situations occasionally arise where it is in the best interests of one client to sell a particular security while being in the best interests of another client to buy that same security. This is referred to as a “cross trade.” Reliant allows its portfolio managers to enter into cross-trades only if doing so is in the best interests of each client. Reliant does not derive any separate fee or other compensation (other than its customary advisory fee) from executing trades in this manner. All cross trades are effected through an independent intermediary like a registered broker-dealer. In addition, the transactions must be effected at the current market price, which will be established in accordance with approved firm methodologies.

Item 12 – Brokerage Practices

Brokerage Relationships. Reliant maintains relationships with numerous broker-dealers for trading purposes to assure that the purchase and sale of securities can be executed competitively and efficiently, and as such may recommended a broker-dealer/custodian to the client. the firm strives to ensure that the best interests of its clients are served in all trading activities, and to execute securities transactions for its clients in such a manner that the client's total cost or proceeds in each transaction is the most favorable under the circumstances. In determining the brokerage relationships utilized, Reliant considers and evaluates the full range and quality of each broker's ability to provide cost-effective and time-sensitive market executions. The determinative factor in the selection of brokerage relationships, however, is not the lowest possible commission cost but whether the transaction represents the best qualitative execution for the client. Current market conditions, pricing, liquidity, broker's level of expertise and responsiveness, availability of electronic trade communication platforms, trade-away or other fees charged by custodians, and a variety of other factors may be relevant to the decision of where to place a specific trade. It is the ongoing responsibility of Reliant personnel to consider both qualitative and quantitative factors that will have an impact on obtaining the best possible execution of a trade.

Use of "Soft Dollars". Reliant may utilize commission dollars generated by account transactions, or "soft dollars," to pay for research, services, or products to be used in the investment decision making process. Any such research, services, or products paid for using soft dollars by Reliant must be determined to be for the benefit of clients of the firm in accordance with Section 28(e) of the Exchange Act of 1934. In the event that the Reliant utilizes soft dollars, the firm will maintain a list of all third-party soft dollar arrangements, and will document the specific research, services, or products paid for with soft dollars, along with the cost and any specific allocations of cost.

Historically, Reliant has utilized soft dollar commission credits to pay for certain proprietary investment research products and services that are created or developed by independent third parties, such as Morningstar. The information purchased is available only through paid subscriptions, and includes general market information, economic data, investment strategy research, security specific information, and proprietary databases used in analyzing investment opportunities. Also, Reliant may choose to use a portion of commission credits to pay a portion of the cost of software systems used for account management, portfolio accounting, and client reporting, such as the Advent Axys software system.

Reliant uses the research obtained using soft dollar commission credits to benefit and serve all of its client accounts, not just those that paid the commissions. Reliant does not allocate soft dollar benefits to client accounts proportionately according to the soft dollar commission credits generated by the client.

In using soft dollar commission credits to pay for these items, Reliant utilizes client brokerage commissions to obtain access to the products and services. The use of soft dollars may cause clients to pay commissions higher than those charged by other brier dealer, in return for the soft dollar benefits. This use of commissions to pay for access to research has the potential for creating a conflict of interest in that transactions may be initiated to satisfy the research cost as opposed to transactions being initiated only for the benefit of the client's portfolio. That potential conflict is monitored continually so as to ensure that transactions are only in the best interest of the client.

Directed Brokerage. Reliant permits clients to direct commissions from their account to one or more specific brokers. This may influence the level of commission discount obtained from that broker, if any. If the assets for an account are held by a specific broker, it is likely that most or all trading will be done through that broker, which may affect the commission level. In such instances, Reliant may be unable to achieve the most favorable execution of client transactions, and trading cost may be higher as a result. For example, in a directed brokerage account, the client may pay higher brokerage commissions because Reliant may not be able to aggregate orders to reduce transaction costs, or the client may receive a less favorable commission rate or execution price. Clients may choose to do this for a variety of reasons, and in each instance, the client provides Reliant with specific written instructions directing the brokerage on their account.

Trade Aggregation. Reliant may, in its sole discretion, aggregate purchases or sales of any security for client accounts with purchases or sales of the same security for the accounts of one or more of the firm's other clients, provided that the transaction occurs on the same day. When transactions are aggregated, the actual prices of each order applicable to the aggregated transaction will be averaged, and each client account participating in the aggregated transaction will be deemed to have purchased or sold its share of the security at the same average price for the total order. In addition, all transaction costs incurred in effecting the aggregated transaction shall be shared on a pro rata basis among all accounts participating in the aggregated order, except, 1) to the extent that certain broker-dealers that also furnish custody or other services may impose minimum transaction charges applicable to some of the participating accounts, or 2) in the case of an account with a directed brokerage relationship. When such concurrent trade aggregations occur, the objective is to allocate the executions in a manner that is equitable to all accounts involved.

Item 13 – Review of Accounts

All client accounts are managed and regularly reviewed by one or more of the Reliant investment professionals. The professionals are Susan L. Huffman, Principal and Chief Investment Officer; John R. Huffman, Principal and Portfolio Strategist; Lon M. Magness, Principal and Portfolio Manager, Hugh Walmsley, Portfolio Strategist and Client Relationship Manager, Reid W. Wesson, Portfolio Manager, Emily M. Dafferner, Financial Planner, and A. Harris Jordan, Jr. Portfolio Manager. While accounts and assets are under continual review by the portfolio management team, firm personnel also meet periodically with clients to provide reviews of their portfolios and update the investment objective or make changes to any guidelines or restrictions. These reviews are conducted at the convenience of the client, and firm personnel attempt to schedule these reviews at least annually.

Asset allocation is monitored to ensure that the general structure of the portfolio meets all objectives established for that client. At any point in time, actual asset allocations may vary from the target asset allocations. Variations are generally related to a shift in client objectives, fluctuations in the value of securities held by the portfolio, or changes in the relative attractiveness of various asset classes. Each security is also monitored to make sure that it is still an appropriate holding. Individual securities may become inappropriate due to a change in underlying fundamentals or to a change in valuation.

In addition to the monthly statement of assets and account activity provided by the qualified custodian for each client account, all accounts receive, at a minimum, a quarterly statement of assets showing cost and market value from Reliant. These written statements are provided in hard-copy format. Other information can be provided as requested or on a customized basis. Reliant’s intent is to provide, within limits, whatever information is useful to the client.

Item 14 – Client Referrals and Other Compensation

Reliant has, and may have, client referral agreements with firms that specialize in financial planning or investment consulting. These firms may recommend Reliant’s investment management services to prospective clients deemed to be compatible with Reliant. The firms providing referrals may be compensated independently, or Reliant may compensate a referring firm by payment of a portion of the annual advisory fee paid to Reliant. In such case, no client so referred will pay a higher fee attributable to Reliant’s compensation arrangement with the referring firm. Both the referring firm and Reliant will maintain a relationship with the client. Because client referral arrangements can create a potential conflict of interest wherein a referring firm may favor Reliant over another investment adviser, a copy of any solicitation agreement between Reliant and a referring firm (or a description of the terms of a solicitation arrangement) will be provided to each prospective client at the time of solicitation to become a client of Reliant.

Item 15 – Custody

Each client account utilizes the services of an independent qualified custodian of the client's choosing, which may be a broker-dealer, bank or other qualified financial institution. The qualified custodian sends account statements directly to the client on a monthly basis, and the records provided by the qualified custodian serve as the official record of holdings and activity in the account. Clients should carefully review the statements provided by the qualified custodian for accuracy. Clients also receive account information directly from Reliant following the end of each quarter, which includes a statement urging the client to always compare the account statements they receive from the qualified custodian with the information received from Reliant. Reliant is deemed to have custody due to the Firm's authority to transfer money from a clients account to a third party through a written standing letter of authorization. For these accounts Reliant follows guidance provided by the SEC to eliminate the requirement of an annual surprise custody exam. In certain instances, an advisory person of Reliant may serve as trustee for a client's account(s), in which case Reliant would be deemed to have custody of those client's assets. Under the custody rule (Rule 206(4)-2 of the Investment Advisers Act of 1940, as amended), Reliant would be required to have an annual surprise examination by an independent public accountant to verify the client funds and securities for the client account(s). Currently, Reliant does not serve as trustee for any client accounts.

Item 16 – Investment Discretion

Reliant accepts full discretionary authority to manage accounts on behalf of clients, including the specific securities to be bought or sold and the amount to be bought or sold. On a case by case basis, Reliant may accept certain limitations on this discretionary authority that a client may request. Examples of such limitations might include, but are not limited to, the ownership of certain securities for tax or other client-specific purposes, the prohibition of purchasing certain types of securities, or the securities of certain issuers. Limitations might also include minimum credit quality ratings, maximum maturity dates, limitations of investment concentration, asset allocation or other specific risk management criteria. Reliant may accept such limitations from its clients verbally or in writing and will maintain appropriate documentation of such instructions in each instance. Prior to accepting any such limitations, a portfolio manager will review and confirm that the request is consistent with Reliant's portfolio management practices and procedures. Reliant will assume that these limitations are to remain in place until otherwise instructed by the client.

A non-discretionary agreement may also be arranged. This non-discretionary agreement would involve giving recommendations only, which the client may choose to accept, reject or modify.

Item 17 – Voting Client Securities

Reliant accepts the authority to vote securities held in client accounts. In voting proxies on behalf of its clients, Reliant determines whether its voting power is subject to any limitations or guidelines issued by the client and determines if an actual or potential conflict of interest exists for the firm or any of its Principals. If no conflict of interest is found to exist, Reliant will cast its vote using the firm's proxy voting policies and procedures. If an actual or potential conflict is found to exist, written notification of the conflict shall be given to the client in sufficient detail and with sufficient time to reasonably inform the client of the actual or potential conflict involved, and a plan of further action will be determined.

Reliant's proxy voting policy states that routine proxies will be voted according to Board or management recommendations as indicated on the proxy. If the proxy contains non-routine matters or issues of significance for a corporation in which the firm or its client(s) maintains a continuing interest, then such issues and direction on how they should be voted are evaluated and executed by the Compliance Officer, who may in turn consult the principals of the firm. In addition, for those corporations in which the firm holds a significant interest, defined as in excess of 5% of shares currently outstanding, the proxy is evaluated and executed by the Compliance Officer, who may consult the principals of the firm on the possible consideration of sending a representative to the Stockholders Meeting.

Reliant attempts to make the process of voting proxies as efficient and timely as possible, and may use the paper ballot received by mail, or it may register to receive proxy material, corporate action notices, or investor communications by electronic mail. The firm may also utilize software, online resources, or other systems available to electronically vote the proxy and efficiently manage the voting process. Regardless of the means by which a ballot or shareholder action notice is received and voted, records are maintained to verify receipt of the voting material, how the proxy was voted, and that the vote was registered.

Clients may obtain a copy of such voting records upon request. Clients may also obtain a copy of Reliant's proxy voting policies and procedures upon request.

Item 18 – Financial Information

Registered investment advisors are required to provide certain financial information regarding the financial condition of the firm. Reliant has no financial commitments that impair its ability to meet contractual and fiduciary commitments to clients and has not ever been the subject of a bankruptcy proceeding.

Reliant does not require or solicit prepayment of more than $1,200.00 in fees per client, six months or more in advance. As such, Reliant is not required to provide a financial statement or balance sheet for the most recent fiscal year with this Form ADV.

End of Firm Brochure ADV Part 2A

Form ADV: Part 2B Brochure Supplement

Item 1 – Cover Page

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This Brochure Supplement provides information about Susan Logan Huffman, John R. Huffman, Lon M. Magness, Hugh B. Walmsley, Reid W. Wesson, Emily M. Dafferner, and A. Harris Jordan, Jr., that supplements the Brochure of Reliant Investment Management, LLC ("Reliant"). If you have any questions about the contents of this Brochure Supplement, please contact us at 1-800-880-3364 or info@reliantllc.com. The information in this Brochure Supplement has not been approved or verified by the United States Securities and Exchange Commission ("SEC") or by any state securities authority.

Additional information about Susan Logan Huffman, John R. Huffman, Lon M. Magness, Hugh B. Walmsley, Reid W. Wesson, Emily M. Dafferner, and A. Harris Jordan, Jr. is available on the SEC's website located at www.adviserinfo.sec.gov.

Item 2 – Educational Background and Business Experience

Susan Logan Huffman. Ms. Huffman is a founder and principal of Reliant, as well as its predecessor firms, Weibel Huffman Keegan, Inc. and Weibel and Logan Investment Management. Since 2001, Ms. Huffman has served as Chief Manager of the firm and as Reliant's Chief Investment Officer. Prior to starting her own firm in 1986, Ms. Huffman was employed by Union Planters National Bank Trust Division, where she served as a Trust Investment Officer from 1983 through 1985.

Ms. Huffman was born in 1961. She received her B.A. degree, cum laude, in Business Administration and Economics from Rhodes College in Memphis, Tennessee in 1983. In 1986, Ms. Huffman received the professional designation of Chartered Financial Analyst ("CFA") and became a member of the CFA Institute. She passed three (3) sequential exams pursuant to obtaining the CFA designation. Ms. Huffman also has obtained the Series 63 and the Series 65 license administered by the Financial Industry Regulatory Authority.

John R. Huffman. Mr. Huffman is a founder and principal of Reliant. He joined Reliant's predecessor firm, Weibel Huffman Keegan, Inc. in 1992. Since 2001, Mr. Huffman has served as Vice Manager at Reliant. His responsibilities at Reliant have included equity and fixed income portfolio strategy, portfolio management, marketing, client relationship management, and client service.

Mr. Huffman was born in 1959 and is a graduate of Christian Brothers University, where he received the B.S. degree in Economics and Finance. In 1986, after serving in the U.S. Marine Corps, he earned his M.B.A. degree in Finance from the University of Memphis. Mr. Huffman has obtained the Series 7 and Series 63 licenses administered by the Financial Industry Regulatory Authority.

Lon M. Magness. Mr. Magness is a principal of Reliant, where his responsibilities include portfolio management, investment strategy, regulatory compliance, and client service. Mr. Magness has been employed by Reliant since 2002. Prior to joining Reliant, he served as President of Commerce Capital Management, Inc., the registered investment advisory subsidiary of National Commerce Financial Corporation in Memphis, Tennessee. Mr. Magness also served as Senior Vice President and Manager of the Portfolio and Funds Management Division of National Bank of Commerce, the lead banking subsidiary of National Commerce Financial Corporation.

Mr. Magness was born in 1967 and obtained his undergraduate degree from Tulane University in 1989. In 1996, he completed the course of study in Bank Management from the Graduate School of Banking at Louisiana State University.

Hugh B. Walmsley. Mr. Walmsley joined Reliant in 2005 and serves as a portfolio strategist and client relationship manager. Hugh is a retired Certified Public Accountant with 30 years of experience in government finance and public accounting. Prior to joining Reliant, Mr. Walmsley served as the Director of Finance for Caddo Parish, Louisiana, where his responsibilities included the investment of Parish funds in excess of $50 million.

Mr. Walmsley was born in 1946 and earned a B. S. Degree in Business (Accounting) from the Louisiana Polytechnic Institute in 1968. Mr. Walmsley is also a member and past president of both the Louisiana Government Finance Officers Association and the Organization of Parish Administrative Officials.

Reid W. Wesson. Mr. Wesson is a Portfolio Manager at Reliant Investment Management, LLC and has been with the firm since September of 2010. He was born in 1987 and graduated from the University of Mississippi with a BA in Accountancy and a minor in Mathematics in May 2010. Reid's responsibilities include investment research and analysis, compliance, portfolio management and accounting, performance measurement, and client service. Mr. Wesson holds the Chartered Financial Analyst professional designation from the CFA Institute and is a CERTIFIED FINANCIAL PLANNER™ practitioner.

Emily M. Dafferner. Ms. Dafferner is a CERTIFIED FINANCIAL PLANNER™ practitioner and is involved in a variety of client service and operational functions for the firm. As well as providing financial planning expertise to the firm's clients, Ms. Dafferner's responsibilities include supporting both the operations area and the firm's portfolio managers. She joined the firm in February of 2014 after working for 5 years as a licensed insurance professional. Ms. Dafferner was born in 1984 and graduated from Rhodes College where she earned the BA Degree in Political Science with a minor in Religious Studies.

A. Harris Jordan, Jr. Mr. Jordan joined Reliant Investment Management, LLC in May of 2018 as a Portfolio Manager. He was born in 1985 and graduated from the University of Tennessee in 2008 with a BS in Finance and a minor in Marketing. Prior to joining Reliant, Mr. Jordan worked as a fixed income underwriter and trader at Duncan-Williams, Inc. where he specialized in municipal security markets. During his career, he has been a featured speaker at numerous banking and investment seminars where he has provided in-depth knowledge and strategy of trading and investing in municipal debt. Mr. Jordan has obtained the Series 7, Series 63, and Series 65 licenses administered by the Financial Industry Regulatory Authority.

Description of Professional Designations

Chartered Financial Analyst (CFA)

The Chartered Financial Analyst (CFA) is a qualification for finance and investment professionals, particularly in the fields of investment management and financial analysis of stocks, bonds and their derivative assets. The program focuses on portfolio management and financial analysis, and provides a general knowledge of other areas of finance. The designation is an international professional certification offered by the CFA Institute to financial analysts who complete a series of three examinations. To become a CFA charter holder, candidates must pass each of the three six-hour exams, possess a bachelor's degree from an accredited institution and have 48 months of qualified professional work experience. CFA charter holders are also obligated to adhere to a strict Code of Ethics and Standards governing their professional conduct.

Certified Financial Planner (CFP®)

The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP (with flame design) marks (collectively, the "CFP® marks") are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board").

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients. Currently, more than 62,000 individuals have obtained CFP® certification in the United States.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- Education – Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board's studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a Bachelor's Degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP Board's financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;
- Examination – Pass the comprehensive CFP® Certification Examination. The examination, administered in 10 hours over a two-day period, includes case studies and client scenarios designed to test one's ability to correctly diagnose financial planning issues and apply one's knowledge of financial planning to real world circumstances;
- Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
- Ethics – Agree to be bound by CFP Board's *Standards of Professional Conduct*, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- Continuing Education – Complete 30 hours of continuing education hours every two years, including two hours on the *Code of Ethics* and other parts of the *Standards of Professional Conduct*, to maintain competence and keep up with developments in the financial planning field; and
- Ethics – Renew an agreement to be bound by the *Standards of Professional Conduct*. The Standards prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board's enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

Item 3 – Disciplinary Information

Supervised persons of registered investment advisors are required to disclose all material facts associated with any legal or disciplinary events that would be material to your evaluation of such supervised persons. Neither Reliant nor Reliant's supervised persons has any history of disciplinary action. There are no known or pending legal or disciplinary events that would be considered material to a client's or prospective client's evaluation of Reliant's supervised persons.

Item 4 – Other Business Activities

No employee or supervised person is currently involved in any other investment related business or occupation.

Item 5 – Additional Compensation

No employee or supervised person receives any compensation or other economic benefit provided by someone who is not a client for providing advisory services.

Item 6 – Supervision

Lon M. Magness, Chief Compliance Officer, is responsible for supervising the advisory activities of all supervised persons on behalf of Reliant. He can be reached at (901) 843-0600.

All supervised persons, including Mr. Magness, must adhere to the Code of Ethics and Standards of Professional Conduct adopted by Reliant. The Code of Ethics covers a range of topics that include general ethical principles; priority of trading and reporting of personal security transactions; participation in initial public offerings and private placements; relationships with clients, prospective clients, and the public; preservation of confidentiality; reporting of conflicts of interest; and supervisory procedures.

End of Firm Brochure Supplement ADV Part 2B