

**Item 1: Cover Page
Part 2B of Form ADV: Brochure Supplement
August 2022**

Benjamin Walker Taggard
TRG Investment Advisors, LLC
and
TRG Retirement Plan Consultants
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Brattleboro VT 05301
www.therichardsgrp.com

This brochure supplement provides information about Mr. Taggard that supplements our brochure. You should have received a copy of that brochure. Please contact Mr. Taggard if you did not receive TRG Investment Advisors, LLC *dba* TRG Retirement Plan Consultants brochure or if you have any questions about the contents of this supplement. Additional information about Mr. Taggard is available on the SEC's website at www.adviserinfo.sec.gov by searching CRD #3107547.

Item 2: Educational Background & Business Experience

Benjamin Walker Taggard
Year of Birth: 1970

Educational Background:

- 1996: Boston College; M.S.; Finance
- 1993: Bentley University; B.S.; Economics & Finance

Business Background:

- 08/2021 – Present TRG Investment Advisors, LLC; Principal & Chief Compliance Officer
- 01/1998 – 08/2021 The Richards Group; Principal

Exams, Licenses & Other Professional Designations:

- 2018: SIE
- 2007: AIF®
- 2002: Series 24
- 1998: Series 6, Series 7, Series 63

Accredited Investment Fiduciary (AIF®)

The AIF® designation certifies that the recipient has specialized knowledge of fiduciary standards of care and their application to the investment management process. To receive the AIF® designation, individuals must complete a training program, successfully pass a comprehensive, closed-book final examination under the supervision of a proctor and agree to abide by the AIF® Code of Ethics. In order to maintain the AIF® designation, the individual must annually renew their affirmation of the AIF Code of Ethics and complete six hours of continuing education credits. The certification is administered by the Center for Fiduciary Studies, LLC (a Fiduciary360 (fi360) company).

Item 3: Disciplinary Information¹

There are no legal or disciplinary events material to the evaluation of Mr. Taggard.

Item 4: Other Business Activities

Mr. Taggard is a Partner of Richards Inc., an insurance and employee benefits firm and the parent company of TRG Investment Advisors, LLC, as well as a licensed insurance agent/broker. He may offer insurance products and receive customary fees as a result of insurance sales. A conflict of

¹ Note: Our firm may, under certain circumstances, rebut the presumption that a disciplinary event is material. If an event is immaterial, we are not required to disclose it. When we review a legal or disciplinary event involving the advisor to determine whether it is appropriate to rebut the presumption of materiality, we consider all of the following factors: (1) the proximity of advisor to the advisory function; (2) the nature of the infraction that led to the disciplinary event; (3) the severity of the disciplinary sanction; and (4) the time elapsed since the date of the disciplinary event. If we conclude that the materiality presumption has been overcome, we prepare and maintain a file memorandum of our determination in our records. We follow SEC rule 204-2(a)(14)(iii) and similar state rules.

interest exists as these insurance sales create an incentive to recommend Richards Inc. To mitigate this conflict, Mr. Taggard, as a fiduciary, will act in the client's best interest.

Item 5: Additional Compensation

Mr. Taggard does not receive any other economic benefit for providing advisory services in addition to advisory fees.

Item 6: Supervision

Jill Golden supervises and monitors Mr. Taggard's activities on a regular basis to ensure compliance with our firm's Code of Ethics. Please contact Ms. Golden if you have any questions about Mr. Mr. Taggard's brochure supplement at 800-222-6016.