



Part 2B of Form ADV: Individual Disclosure Brochure

for

Allen Lassinger
Investment Advisor Representative

7600 Castor Avenue
Philadelphia, PA 19152
(724) 672-3876

August 16, 2024

This brochure supplement provides information about Allen Lassinger that supplements the Trustmont Advisory Group, Inc. brochure. You should have received a copy of that brochure. Please contact Allen Lassinger, Investment Advisor Representative, if you did not receive the Trustmont Advisory Group, Inc. brochure or if you have any questions about this supplement.

Additional information about Allen Lassinger is available on the SEC's website www.adviserinfo.sec.gov.

Trustmont Advisory Group, Inc
200 Brush Run Road
Suite A
Greensburg, PA 15601
(724) 468-5665
www.trustmontgroup.com

Item 2 Educational Background and Business Experience

Year of Birth: 1983

Formal Education After High School:

St. Francis University; Bachelors Accounting and Business Management
2002 - 2006

Business Background for the Preceding Five Years:

Trustmont Advisory Group, Inc.,; Investment Advisor Representative
01/2024 – Present
Association for Professionals in Infection Control; Vice President
02/20219 – 02/2024
International Association of Fire Chiefs; Director of Finance
12/2017 - 02/2019

Professional Designations

Certified Public Accountant – CPA®

This professional designation is created under guidelines by The American Institute of Certified Public Accountants (AICPA) . The Uniform CPA exam can only be taken by accountants who already have professional experience in the field and a bachelor’s degree. The CPA exam is a 16-hour exam consisting of four sections, each of which must be completed in four hours. Candidates are required to completed 150 hours of educations and have no fewer than two years of public account experience.

Chartered Global Management Accountant – CGMA®

This professional designation requires you to be a member of the American Institute of Certified Public Accountants (AICPA) and be in good standing. Designees must have a minimum of 3 years of relevant, work-based, practical management accounting experience. Designees must abide by the AICPA Bylaws and Code of Professional Conduct. After earning the CGMA designation, Designees are required to complete continuing professional development to remain current with competencies.

Item 3 Disciplinary Information

Allen Lassinger does not have any reportable disciplinary events.

Item 4 Other Business Activities

Your Investment Advisor Representative (“Advisor”) , who provides investment advice for a fee, may also engage in the following activities:

Lassinger Consulting; Certified Public Accountant

Item 5 Additional Compensation

Your Investment Advisor Representative does not receive any Additional Compensation.

Item 6 Supervision

Trustmont Advisory Group, Inc. has created policies and procedures reasonably designed to prevent violation of the Investment Advisers Act of 1940 and the rules that the Security and Exchange Commission have adopted under the Act. Trustmont Advisory Group, Inc. does not oversee the direct investment advice that your Investment Advisor gives to a client or potential client. Client or potential clients should rely exclusively on the expertise and knowledge of the Investment Advisor for all advice and recommendations. Trustmont Advisory Group, Inc. does have guidelines on the advice that your Investment Advisor provides. These guidelines include but are not limited to: Your Investment Advisor Representative must provide advice that is in the client's best interest and must not place their interests ahead of the client's interest under any circumstances. Your Investment Advisor must follow specific fiduciary obligations when dealing with clients, obligations such as but not limited to: the duty to have a reasonable, independent basis for the investment advice provided, the duty to ensure that investment advice is suitable to meeting the client's individual objectives, needs and circumstances and a duty to be loyal to clients. Engaging in any fraudulent or deceitful conduct with clients or potential client is strictly prohibited. Examples of fraudulent conduct include but are not limited to: misrepresentation, nondisclosure of fees and/or misappropriation of client funds.

Your Investment Advisor is supervised by MaryLynne Hixenbaugh, Chief Compliance Officer, of Trustmont Advisory Group, Inc. Contact information is on the cover page of this supplement.