Form ADV Part 2B – Brochure Supplement

for

Ashlee B. Patten, CFA®
President,
Chief Executive Officer,
Chief Investment Officer &
Senior Portfolio Manager

Effective: February 25, 2026

This Form ADV Part 2B ("Brochure Supplement") provides information about the background and qualifications of Ashlee B. Patten (CRD# 6208041) in addition to the information contained in The Patten Group ("TPG" or the "Advisor") (CRD # 168255) Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of the TPG Disclosure Brochure or this Brochure Supplement, please contact the Advisor at (423) 531-0360.

Additional information about Ms. Patten is available on the SEC's Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching with her full name or her Individual CRD# 6208041.

Item 2 – Educational Background and Business Experience

Ashlee B. Patten, CFA®, born in 1967, is dedicated to advising Clients of TPG in her roles as the President, Chief Executive Officer, Chief Investment Officer and Senior Portfolio Manager. Ms. Patten earned a Bachelor of Arts in History and a certificate in American Studies from Princeton University in 1990 and a Masters in Exercise Science from Smith College in 2000. Additional information regarding Ms. Patten's employment history is included below.

Employment History:

President and Chief Executive Officer,Chief Investment Officer & Senior Portfolio Manager, The Patten Group, Inc.	02/2020 to Present
Chief Investment Officer & Portfolio Manager, The Patten Group, Inc.	03/2014 to 01/2020
Managing Member & Chief Executive Officer, Ashlee Patten Group, LLC	12/2014 to Present
Portfolio Manager and Research Analyst, Patten and Patten, Inc.	01/2001 to 03/2014

Chartered Financial Analyst™ ("CFA®")

The Chartered Financial Analyst™ ("CFA®") charter is a professional designation established in 1962 and awarded by CFA® Institute. To earn the CFA® charter, candidates must pass three sequential, six-hour examinations over two to four years. The three levels of the CFA® Program test a wide range of investment topics, including ethical and professional standards, fixed-income analysis, alternative and derivative investments, and portfolio management and wealth planning. Also, CFA® charter holders must have at least four years of acceptable professional experience in the investment decision-making process and must commit to abide by, and annually reaffirm their adherence to the CFA® Institute Code of Ethics and Standards of Professional Conduct. CFA® is a trademark owned by CFA® Institute.

Item 3 – Disciplinary Information

There are no legal, civil or disciplinary events to disclose regarding Ms. Patten. Ms. Patten has never been involved in any regulatory, civil or criminal action. There have been no client complaints, lawsuits, arbitration claims or administrative proceedings against Ms. Patten.

Securities laws require an advisor to disclose any instances where the advisor or its advisory persons have been found liable in a legal, regulatory, civil or arbitration matter that alleges violation of securities and other statutes; fraud; false statements or omissions; theft, embezzlement or wrongful taking of property; bribery, forgery, counterfeiting, or extortion; and/or dishonest, unfair or unethical practices. ***As previously noted, there are no legal, civil or disciplinary events to disclose regarding Ms. Patten.***

However, the Advisor does encourage you to independently view the background of Ms. Patten on the Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching with her full name or her Individual CRD# 6208041.

Item 4 – Other Business Activities

Ashlee Patten Group, LLC

Ms. Patten, in her individual capacity, is also Managing Member of Ashlee Patten Group, LLC ("APG"), located in Chattanooga, TN. APG conducts agricultural business. Ms. Patten is compensated based on membership income in relation to the sale of goat breeding stock, goat meat, chickens, eggs and the breeding of Maremma sheepdogs. Ms. Patten is the assistant goat herd caretaker & supervisor of the chicken flock and spends approximately 8-20 hours per month to conduct farm business.

Tugboat, LLC
Ms. Patten, in her individual capacity, serves as a Managing Member of Tugboat, LLC, located in Signal Mountain, TN. Tugboat, LLC is a real estate development and timberland management company. Ms. Patten spends approximately 10-20 hours per month of her time in this capacity.

Volunteer Position
Ms. Patten, in her individual capacity, serves as a Trustee with the University of Chattanooga Foundation. She is currently the Chairperson and serves on the standing committees. Less than 5% of her time is spent on responsibilities with this foundation.

Item 5 – Additional Compensation

Ms. Patten has additional business activities where compensation is received that are detailed in Item 4 above. Ms. Patten also has a real estate investment portfolio, including rental properties in the Chattanooga area.

Item 6 – Supervision

Ms. Patten serves as the President, Chief Executive Officer, Chief Investment Officer and a Senior Portfolio Manager for TPG and is responsible for the supervision of all advisory activities. In the event Ms. Patten is unavailable, Adrienne Zingrich, Chief Compliance Officer and Chief Operating Officer, would be the appropriate contact. Both Ms. Patten and Ms. Zingrich can be reached at (423) 531-0360.

TPG has implemented a Code of Ethics, an internal compliance document that guides each Supervised Person, including Ms. Patten, in meeting their fiduciary obligations to Clients of TPG. Further, TPG is subject to regulatory oversight by various agencies. These agencies require registration by TPG and its Supervised Persons. As a registered entity, TPG is subject to examinations by regulators, which may be announced or unannounced. TPG is required to periodically update the information provided to these agencies and to provide various reports regarding the business activities and assets of the Advisor.

Form ADV Part 2B – Brochure Supplement

for

Adrienne L. Zingrich, CFP®
Chief Compliance Officer,
Chief Operating Officer &
Investment Advisor Representative

Effective: February 25, 2026

This Form ADV Part 2B ("Brochure Supplement") provides information about the background and qualifications of Adrienne L. Zingrich (CRD# 5364434) in addition to the information contained in The Patten Group, LLC ("TPG" or the "Advisor") (CRD # 168255) Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of the TPG Disclosure Brochure or this Brochure Supplement, please contact the Advisor at (423) 531-0360.

Additional information about Ms. Zingrich is available on the SEC's Investment Advisor Public Disclosure website at www.adviserinfo.sec.gov by searching with her full name or her Individual CRD# 5364434.

Item 2 – Educational Background and Business Experience

Adrienne L. Zingrich, CFP®, born in 1985, is dedicated to advising Clients of TPG in her roles as the Chief Compliance Officer, Chief Operating Officer and Investment Advisor Representative. Ms. Zingrich earned a Bachelor of Arts in Economics and Organizational Management from Agnes Scott College in 2008. Additional information regarding Ms. Zingrich's employment history is included below.

Employment History:

Chief Compliance Officer, Chief Operating Officer & Investment Advisor Representative, The Patten Group, Inc.	01/2016 to Present
Chief Compliance Officer, Chief Operating Officer & Investment Advisor Representative, Ashlee Patten Group, LLC	12/2014 to 03/2020
Investment Advisor Representative, The Patten Group, Inc.	10/2014 to 12/2015
Associate, The Patten Group, Inc.	08/2014 to 10/2014
Portfolio Administrator, Patten and Patten, Inc.	12/2008 to 02/2011

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 87,000 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 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).
- *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.
- *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 the CFP Board's enforcement process, which could result in suspension or permanent revocation of their CFP®.

Item 3 – Disciplinary Information

There are no legal, civil or disciplinary events to disclose regarding Ms. Zingrich. Ms. Zingrich has never been involved in any regulatory, civil or criminal action. There have been no client complaints, lawsuits, arbitration claims or administrative proceedings against Ms. Zingrich.

Securities laws require an advisor to disclose any instances where the advisor or its advisory persons have been found liable in a legal, regulatory, civil or arbitration matter that alleges violation of securities and other statutes; fraud; false statements or omissions; theft, embezzlement or wrongful taking of property; bribery, forgery, counterfeiting, or extortion; and/or dishonest, unfair or unethical practices. ***As previously noted, there are no legal, civil or disciplinary events to disclose regarding Ms. Zingrich.***

However, the Advisor does encourage you to independently view the background of Ms. Zingrich on the Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching with her full name or her Individual CRD# 5364434.

Item 4 – Other Business Activities

Ms. Zingrich is dedicated to the investment advisory activities of TPG's clients. Ms. Zingrich does not have any other business activities.

Item 5 – Additional Compensation

Ms. Zingrich is dedicated to the investment advisory activities of TPG's clients. Ms. Zingrich does not receive any additional forms of compensation.

Item 6 – Supervision

Ms. Zingrich serves as the Chief Compliance Officer, Chief Operating Officer and an Investment Advisor Representative of TPG and is supervised by Ashlee Patten, the President and Chief Executive Officer. Ms. Patten can be reached at (423) 531-3480.

TPG has implemented a Code of Ethics, an internal compliance document that guides each Supervised Person, including Ms. Zingrich, in meeting their fiduciary obligations to Clients of TPG. Further, TPG is subject to regulatory oversight by various agencies. These agencies require registration by TPG and its Supervised Persons. As a registered entity, TPG is subject to examinations by regulators, which may be announced or unannounced. TPG is required to periodically update the information provided to these agencies and to provide various reports regarding the business activities and assets of the Advisor.

Form ADV Part 2B – Brochure Supplement

for

Chandler A. Thurmon
Research Associate &
Investment Advisor Representative

Effective: February 25, 2026

This Form ADV 2B ("Brochure Supplement") provides information about the background and qualifications of Chandler A. Thurmon (CRD# 7208319) in addition to the information contained in The Patten Group, Inc. ("TPG" or the "Advisor", CRD# 168255) Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of the TPG Disclosure Brochure or this Brochure Supplement, please contact the Advisor at (423) 531-0360.

Additional information about Mr. Thurmon is available on the SEC's Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching with his full name or his Individual CRD# 7208319.

Item 2 – Educational Background and Business Experience

Chandler A. Thurmon, born in 1997, is dedicated to advising Clients of TPG as a Research Associate & Investment Advisor Representative. Mr. Thurmon earned a Bachelor of Science in Finance, Investments from The University of Tennessee at Chattanooga in 2019. Additional information regarding Mr. Thurmon's employment history is included below.

Employment History:

Research Associate & Investment Advisor Representative, The Patten Group, Inc.	09/2019 to Present

Item 3 – Disciplinary Information

There are no legal, civil or disciplinary events to disclose regarding Mr. Thurmon. Mr. Thurmon has never been involved in any regulatory, civil or criminal action. There have been no client complaints, lawsuits, arbitration claims or administrative proceedings against Mr. Thurmon.

Securities laws require an advisor to disclose any instances where the advisor or its advisory persons have been found liable in a legal, regulatory, civil or arbitration matter that alleges violation of securities and other statutes; fraud; false statements or omissions; theft, embezzlement or wrongful taking of property; bribery, forgery, counterfeiting, or extortion; and/or dishonest, unfair or unethical practices. ***As previously noted, there are no legal, civil or disciplinary events to disclose regarding Mr. Thurmon.***

However, we do encourage you to independently view the background of Mr. Thurmon on the Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching with his full name or his Individual CRD# 7208319.

Item 4 – Other Business Activities

Mr. Thurmon is dedicated to the investment advisory activities of TPG's clients. Mr. Thurmon does not have any other business activities.

Item 5 – Additional Compensation

Mr. Thurmon is dedicated to the investment advisory activities of TPG's clients. Mr. Thurmon does not receive any other forms of compensation.

Item 6 – Supervision

Mr. Thurmon serves as a Research Associate & Investment Advisor Representative of TPG and is supervised by Ashlee B. Patten, the President and Chief Executive Officer. Ms. Patten can be reached at (423) 531-0360.

TPG has implemented a Code of Ethics, an internal compliance document that guides each Supervised Person, including Mr. Thurmon, in meeting their fiduciary obligations to Clients of TPG. Further, TPG is subject to regulatory oversight by various agencies. These agencies require registration by TPG and its Supervised Persons. As a registered entity, TPG is subject to examinations by regulators, which may be announced or unannounced. TPG is required to periodically update the information provided to these agencies and to provide various reports regarding the business activities and assets of the Advisor.

Form ADV Part 2B – Brochure Supplement

for

Kayla A. Coyle
Director of Client Services

Effective: February 25, 2026

This Form ADV Part 2B ("Brochure Supplement") provides information about the background and qualifications of Kayla A. Coyle (CRD# 6311845) in addition to the information contained in The Patten Group ("TPG" or the "Advisor") (CRD # 168255) Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of the TPG Disclosure Brochure or this Brochure Supplement, please contact the Advisor at (423) 531-0360.

Additional information about Ms. Coyle is available on the SEC's Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching with her full name or her Individual CRD# 6311845.

Item 2 – Educational Background and Business Experience

Kayla A. Coyle, born in 1987, is dedicated to serving Clients of TPG in her role as Director of Client Services. Ms. Coyle earned an Associate's Degree in Entrepreneurship from Chattanooga State Community College in 2013. Additional information regarding Ms. Coyle's employment history is included below.

Employment History:

Director of Client Services, The Patten Group, Inc.	2/2024 to Present
Client Services Associate, The Patten Group, Inc.	06/2023 to 2/2024
Wealth Management Associate, UBS Financial Services, Inc.	03/2014 to 06/2023

Item 3 – Disciplinary Information

There are no legal, civil or disciplinary events to disclose regarding Ms. Coyle. Ms. Coyle has never been involved in any regulatory, civil or criminal action. There have been no client complaints, lawsuits, arbitration claims or administrative proceedings against Ms. Coyle.

Securities laws require an advisor to disclose any instances where the advisor or its advisory persons have been found liable in a legal, regulatory, civil or arbitration matter that alleges violation of securities and other statutes; fraud; false statements or omissions; theft, embezzlement or wrongful taking of property; bribery, forgery, counterfeiting, or extortion; and/or dishonest, unfair or unethical practices. ***As previously noted, there are no legal, civil or disciplinary events to disclose regarding Ms. Coyle.***

However, the Advisor does encourage you to independently view the background of Ms. Coyle on the Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching with her full name or her Individual CRD# 6311845.

Item 4 – Other Business Activities

Ms. Coyle is dedicated to the investment advisory activities of TPG's clients. Ms. Coyle does not have any other business activities.

Item 5 – Additional Compensation

Ms. Coyle is dedicated to the investment advisory activities of TPG's clients. Ms. Coyle does not receive any other forms of compensation.

Item 6 – Supervision

Ms. Coyle serves as Director of Client Services for TPG and is supervised by Ashlee B. Patten, the President and Chief Executive Officer. Ms. Patten can be reached at (423) 531-0360.

TPG has implemented a Code of Ethics, an internal compliance document that guides each Supervised Person, including Ms. Coyle, in meeting their fiduciary obligations to Clients of TPG. Further, TPG is subject to regulatory oversight by various agencies. These agencies require registration by TPG and its Supervised Persons. As a registered entity, TPG is subject to examinations by regulators, which may be announced or unannounced. TPG is required to periodically update the information provided to these agencies and to provide various reports regarding the business activities and assets of the Advisor.

Form ADV Part 2B – Brochure Supplement

for

John Adam Jones, CFA®
Research Associate & Portfolio Manager

Effective: February 25, 2026

This Form ADV Part 2B ("Brochure Supplement") provides information about the background and qualifications of John Adam Jones, CFA (CRD# 7960839) in addition to the information contained in The Patten Group ("TPG" or the "Advisor") (CRD # 168255) Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of the TPG Disclosure Brochure or this Brochure Supplement, please contact the Advisor at (423) 531-0360.

Additional information about Mr. Jones is available on the SEC's Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching with his full name or his Individual CRD# 7960839.

Item 2 – Educational Background and Business Experience

John Adam Jones, CFA®, born in 1983, is dedicated to serving Clients of TPG in his role as a Research Associate and Portfolio Manager. Mr. Jones earned a Bachelor of Science in Finance, Investments from The University of Tennessee at Chattanooga in 2005. Additional information regarding Mr. Jones' employment history is included below.

Employment History:

Research Associate & Portfolio Manager, The Patten Group, Inc.	07/2024 to Present
Chief Financal Officer, Veritas International	08/2023 to 06/2023
Financial Strategist, Happy Feet International	08/2023 to 06/2023
Treasury Director, Electric Power Board of Chattanooga	08/2016 to 05/2023
Financial Consultant, Electric Power Board of Chattanooga	01/2010 to 08/2016
Finance Administrator, Electric Power Board of Chattanooga	07/2007 to 01/2010
Portfolio Administrator, Patten & Patten, Inc.	01/2006 to 06/2007
Office Assistant, Patten & Patten, Inc.	04/2004 to 12/2005

Chartered Financial Analyst™ ("CFA®")

The Chartered Financial Analyst™ ("CFA®") charter is a professional designation established in 1962 and awarded by CFA® Institute. To earn the CFA® charter, candidates must pass three sequential, six-hour examinations over two to four years. The three levels of the CFA® Program test a wide range of investment topics, including ethical and professional standards, fixed-income analysis, alternative and derivative investments, and portfolio management and wealth planning. Also, CFA® charter holders must have at least four years of acceptable professional experience in the investment decision-making process and must commit to abide by, and annually reaffirm their adherence to the CFA® Institute Code of Ethics and Standards of Professional Conduct. CFA® is a trademark owned by CFA® Institute.

Item 3 – Disciplinary Information

There are no legal, civil or disciplinary events to disclose regarding Mr Jones. Mr. Jones has never been involved in any regulatory, civil, or criminal action. There have been no client complaints, lawsuits, arbitration claims or administrative proceedings against Mr. Jones.

Securities laws require an advisor to disclose any instances where the advisor or its advisory persons have been found liable in a legal, regulatory, civil or arbitration matter that alleges violation of securities and other statutes; fraud; false statements or omissions; theft, embezzlement or wrongful taking of property; bribery, forgery, counterfeiting, or extortion; and/or dishonest, unfair or unethical practices. ***As previously noted, there are no legal, civil or disciplinary events to disclose regarding Mr. Jones***

However, the Advisor does encourage you to independently view the background of Mr. Jones on the Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching with his full name or his Individual CRD#7960839.

Item 4 – Other Business Activities

Mr. Jones is dedicated to the investment advisory activities of TPG's clients. Mr. Jones does not have any other business activities.

Item 5 – Additional Compensation

Mr. Jones is dedicated to the investment advisory activities of TPG's clients. Mr. Jones does not receive any other forms of compensation.

Item 6 – Supervision

Mr. Jones serves as a Research Associate and is a Portfolio Manager of TPG. Mr. Jones is supervised by Ashlee Patten, the President and Chief Executive Officer. Ms. Patten can be reached at (423) 531-0360.

TPG has implemented a Code of Ethics, an internal compliance document that guides each Supervised Person, including Mr. Jones, in meeting their fiduciary obligations to Clients of TPG. Further, TPG is subject to regulatory oversight by various agencies. These agencies require registration by TPG and its Supervised Persons. As a registered entity, TPG is subject to examinations by regulators, which may be announced or unannounced. TPG is required to periodically update the information provided to these agencies and to provide various reports regarding the business activities and assets of the Advisor.

Form ADV Part 2B – Brochure Supplement

for

Grant M. Allen, CFA®
Research Associate & Portfolio Manager

Effective: February 25, 2026

This Form ADV Part 2B ("Brochure Supplement") provides information about the background and qualifications of Grant M. Allen, CFA (CRD# 7161012) in addition to the information contained in The Patten Group ("TPG" or the "Advisor") (CRD # 168255) Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of the TPG Disclosure Brochure or this Brochure Supplement, please contact the Advisor at (423) 531-0360.

Additional information about Mr. Allen is available on the SEC's Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching with his full name or his Individual CRD# 7960839.

Item 2 – Educational Background and Business Experience

Grant M. Allen, CFA®, born in 1995, is dedicated to serving Clients of TPG in his role as a Research Associate and Portfolio Manager. Mr. Allen earned a Bachelor of Science in Finance, Investments from The University of Tennessee at Chattanooga in 2015. Additional information regarding Mr. Allen's employment history is included below.

Employment History:

Research Associate & Portfolio Manager, The Patten Group, Inc.	02/2025 to Present
Acumen Wealth Advisors, LLC	07/2019 to 02/2025
ACA Compliance Group	01/2019 to 07/2019
Blue Cross Blue Shield of Tennessee	07/2018 to 01/2019
Tennessee Valley Federal Credit Union	08/2017 to 07/2018
Dillards	08/2016 to 08/2017
Council Fire Golf Course	02/2015 to 08/2016

Chartered Financial Analyst™ ("CFA®")
The Chartered Financial Analyst™ ("CFA®") charter is a professional designation established in 1962 and awarded by CFA® Institute. To earn the CFA® charter, candidates must pass three sequential, six-hour examinations over two to four years. The three levels of the CFA® Program test a wide range of investment topics, including ethical and professional standards, fixed-income analysis, alternative and derivative investments, and portfolio management and wealth planning. Also, CFA® charter holders must have at least four years of acceptable professional experience in the investment decision-making process and must commit to abide by, and annually reaffirm their adherence to the CFA® Institute Code of Ethics and Standards of Professional Conduct. CFA® is a trademark owned by CFA® Institute.

Item 3 – Disciplinary Information

There are no legal, civil or disciplinary events to disclose regarding Mr Allen. Mr. Allen has never been involved in any regulatory, civil, or criminal action. There have been no client complaints, lawsuits, arbitration claims or administrative proceedings against Mr. Allen.

Securities laws require an advisor to disclose any instances where the advisor or its advisory persons have been found liable in a legal, regulatory, civil or arbitration matter that alleges violation of securities and other statutes; fraud; false statements or omissions; theft, embezzlement or wrongful taking of property; bribery, forgery, counterfeiting, or extortion; and/or dishonest, unfair or unethical practices. ***As previously noted, there are no legal, civil or disciplinary events to disclose regarding Mr. Allen.***

However, the Advisor does encourage you to independently view the background of Mr. Allen on the Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching with his full name or his Individual CRD #7161012.

Item 4 – Other Business Activities

Mr. Allen is dedicated to the investment advisory activities of TPG's clients. Mr. Allen does not have any other business activities.

Item 5 – Additional Compensation

Mr. Allen is dedicated to the investment advisory activities of TPG's clients. Mr. Allen does not receive any other forms of compensation.

Item 6 – Supervision

Mr. Allen serves as a Research Associate and is a Portfolio Manager of TPG. Mr. Allen is supervised by Ashlee Patten, the President and Chief Executive Officer. Ms. Patten can be reached at (423) 531-0360.

TPG has implemented a Code of Ethics, an internal compliance document that guides each Supervised Person, including Mr. Allen, in meeting their fiduciary obligations to Clients of TPG. Further, TPG is subject to regulatory oversight by various agencies. These agencies require registration by TPG and its Supervised Persons. As a registered entity, TPG is subject to examinations by regulators, which may be announced or unannounced. TPG is required to periodically update the information provided to these agencies and to provide various reports regarding the business activities and assets of the Advisor.

Form ADV Part 2B – Brochure Supplement

for

Christian Luke Johnson
Research Associate & Investment Advisor Representative

Effective: February 25, 2026

This Form ADV Part 2B ("Brochure Supplement") provides information about the background and qualifications of Christian Luke Johnson (CRD# 7842820) in addition to the information contained in The Patten Group ("TPG" or the "Advisor") (CRD # 168255) Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of the TPG Disclosure Brochure or this Brochure Supplement, please contact the Advisor at (423) 531-0360.

Additional information about Mr. Johnson is available on the SEC's Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching with his full name or his Individual CRD# 7842820.

Item 2 – Educational Background and Business Experience

Christian Luke Johnson, born in 2001, is dedicated to serving Clients of TPG in his role as a Research Associate & Investment Advisor Representative. Mr. Johnson earned a bachelor's degree in finance from the University of Tennessee at Chattanooga in 2023. Additional information regarding Mr. Johnson's employment history is included below.

Employment History:

Research Associate & Investment Advisor Representative, The Patten Group, Inc.	11/2025 to Present
Investment Analyst, Acumen Wealth Advisors	05/2023 to 10/2025
Student, University of Tennessee at Chattanooga	08/2019 to 05/2023
Investment Analyst (Part time), Acumen Wealth Advisors	01/2023 to 04/2023
Intern, Patten & Patten, Inc.	03/2021 to 12/2022

Item 3 – Disciplinary Information

Thise are no legal, civil or disciplinary events to disclose regarding Mr. Johnson. Mr. Johnson has never been involved in any regulatory, civil or criminal action. There have been no client complaints, lawsuits, arbitration claims or administrative proceedings against Mr. Johnson.

Securities laws require an advisor to disclose any instances where the advisor or its advisory persons have been found liable in a legal, regulatory, civil or arbitration matter that alleges violation of securities and other statutes; fraud; false statements or omissions; theft, embezzlement or wrongful taking of property; bribery, forgery, counterfeiting, or extortion; and/or dishonest, unfair or unethical practices. ***As previously noted, there are no legal, civil or disciplinary events to disclose regarding Mr. Johnson.***

However, the Advisor does encourage you to independently view the background of Mr. Johnson on the Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching with his full name or his Individual CRD #7842820.

Item 4 – Other Business Activities

Mr. Johnson is dedicated to the investment advisory activities of TPG's clients. Mr. Johnson does not have any other business activities.

Item 5 – Additional Compensation

Mr. Johnson is dedicated to the investment advisory activities of TPG's clients. Mr. Johnson does not receive any other forms of compensation.

Item 6 – Supervision

Mr. Johnson serves as a Research Associate & Investment Advisor Representative for TPG and is supervised by Ashlee B. Patten, the President and Chief Executive Officer. Ms. Patten can be reached at (423) 531-0360.

TPG has implemented a Code of Ethics, an internal compliance document that guides each Supervised Person, including Mr. Johnson, in meeting their fiduciary obligations to Clients of TPG. Furthis, TPG is subject to regulatory oversight by various agencies. These agencies require registration by TPG and its Supervised Persons. As a registered entity, TPG is subject to examinations by regulators, which may be announced or unannounced. TPG is required to periodically update the information provided to these agencies and to provide various reports regarding the business activities and assets of the Advisor.