

Firm Brochure Supplement

Part 2B of ADV

Version Date: 31 December 2025

Advisory Firm

Tingey Advisors, Inc.
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Phone: 801-352-8166

Principal

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Other Investment Professionals:

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Disclaimer:

This brochure provides information about Jon D. Tingey, CFA or other investment professionals and supplements Tingey Advisors' Firm Brochure Part 2A of ADV. If you have any questions or have not received the Firm Brochure, please contact Jon D. Tingey, CFA at (801) 352-8166.

Name of Advisory Firm

Tingey Advisors, Inc. is a DBA of Cannon Tingey Investment Advisors, Inc.
Additional information is available on the SEC's website at www.adviserinfo.sec.gov. The respective CRD numbers are as follows:
Tingey Advisors, Inc: 107539 Jon D. Tingey, CFA: 4369207

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Education Background and Business Experience

Tingey Advisors, Inc. is owned by Jon D. Tingey, CFA (age 63). Jon D. Tingey, CFA serves as officer and director. Jon D. Tingey, CFA, directs the investment committee that determines general investment strategy. Other members of the investment committee are Conner D. Whipple, Jan A. Pazzi, CFA and Michael A. Pazzi. Each client has a "lead portfolio manager" for the purpose of specific strategy implementation and communication. Jon D. Tingey, CFA, Jan A. Pazzi, CFA, and Conner D. Whipple are portfolio managers and when not acting as "lead portfolio manager", provide support to the other managers as needed. The educational and business backgrounds of each principal are shown below with a short bios of the members of the investment committee also shown below.

Jon D. Tingey, CFA

32 years investment management experience
Principal, Tingey Advisors, Inc. 1999-present
VP, Portfolio Mgr. & Investment Team Leader, Wells Fargo (Utah) 1995-1999
CEO, ANSCO Technologies 1993-1994
Senior Executive, System Connection 1989-1993
Assistant to Senior VP of Intermountain Healthcare 1987-1989
President, Salt Lake Society of Financial Analysts 2001-2002
Adjunct Professor, University of Utah 2000-2001

Chartered Financial Analyst – since 1998
MBA from University of Utah – since 1987
BA Finance from University of Utah – 1986

Conner D. Whipple

14 years investment management experience
Portfolio Manager, Grandeur Peak Global Advisors 2012-2025
MBA, University of Oxford, 2019-2020
BS Finance from Brigham Young University 2010-2014

Michael A. Pazzi and Jan A. Pazzi, CFA: Michael and Jan Pazzi bring over 50 years of collective experience in the financial services industry. Michael spent 23 years as an executive with Wells Fargo Bank, managing the strategic business segment of Business Banking. Jan is a Certified Financial Analyst (CFA) and has experience in both the banking and investment fields. Currently, Jan is a portfolio manager and serves as the lead fixed income trader for Tingey Advisors, Inc.

Disciplinary Information

Neither Tingey Advisors, Inc., nor its principals have been subject to any lawsuits or professional disciplinary action.

Other Business Activities

Additional affiliations of Jon Tingey are as follows:

Jon D. Tingey, CFA

- Former shareholder and director of ISYS Technologies - a privately held computer manufacturer headquartered in Salt Lake City, Utah. Resigned as director January 31, 2013.
- Shareholder and former director of Amendment II - a privately held manufacturer of body armor for the military, law enforcement and commercial industries. Jon resigned as director January 24, 2013.
- Shareholder and former director of Rich Broadcasting – a privately held media company with radio stations in the state of Idaho. Resigned as director February 11, 2015.
- Shareholder of Genesis Chemical – a privately held chemical company.
- Shareholder of Ocean Biomedical Inc. - a publicly traded pharmaceutical company.
- Shareholder of Lafayette Energy Corp. – a privately held energy company.
- CFA Society of Salt Lake – the local society of CFA Institute, a global nonprofit member organization of financial analysts, portfolio managers and other investment professionals.
- Former Director of Granite Education Foundation – a private foundation whose mission is to further the education of children and success of teachers in the Granite School District. Jon resigned as director in June 2019.
- Member, Mount Olympus Volleyball Club, LLC, dba JDTGWT Properties, LLC – property rental.
- Member, 2101 Partners, LLC – owns office building serving as residence for Tingey Advisors, Inc.

Additional Compensation

Tingey Advisors does not compensate third parties for client referrals, nor does it receive compensation from any third party for advisory services it provides clients.

Supervision

Jon D. Tingey, CFA, Jan A. Pazzi, CFA, and Conner Whipple are the employees and people who provide investment advice currently. Jon D. Tingey, CFA directs the investment committee that determines general investment strategy and direction, and provides oversight and supervision for the investment research, decision-making and portfolio implementation process. Michael A. Pazzi sits on the investment committee and provides research and investment strategy support but does not provide investment advice to clients. Jan A. Pazzi, CFA and Conner D. Whipple also sit on the investment committee providing research and investment strategy support. Contact information for each investment professional is found on the cover sheet of this document.

Requirements for State-Registered Advisers

Jon D. Tingey, CFA has never been found liable in any civil, self-regulatory organization, administrative proceeding, or arbitration claim that would be material to the evaluation of the advisory business or the integrity of Jon D. Tingey, CFA. He has not been subject to a civil lawsuit or personal bankruptcy petition. TA and/or its principal have not been involved in any legal or disciplinary events that would be material to the evaluation of the advisory business or the integrity of Jon D. Tingey, CFA. Neither TA nor its principal has been the subject of a bankruptcy petition.

26 January 2026
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