



ITEM 1 – COVER PAGE

PART 2B OF FORM ADV

Brochure Supplement

Timothy Albergotti, CEPA®

August 8, 2026

SUPERVISED PERSON

The Templeton Group
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FIRM

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This Brochure Supplement provides information about Timothy Albergotti (CRD# 7792544) that supplements the Great Valley Advisor Group, Inc. ("GVA") Brochure. You should have received a copy of that Brochure. Please contact the GVA office at 302-483-7200 if you have not received GVA's Brochure or if you have any questions about the contents of this supplement.

Additional information regarding Timothy Albergotti pertaining to any disciplinary actions or outside business activities, if applicable, is available on the SEC's website at www.adviserinfo.sec.gov or the FINRA Broker Check website, www.finra.org/brokercheck.

Item 2 – Educational Background and Business Experience

DOB: September 19, 1995

EDUCATION

- Edisto High School – Graduated 2014
- SIE Securities Industry Essentials Examination (SIE), 05/25/2023
- Series 7 General Securities Representative Examination, 10/5/2023
- Series 66 Uniform Combined State Law Examination, 12/20/2023

CEPA® Certified Exit Planning Advisor

The Certified Exit Planning Advisor Program is a five-day executive MBA-style program held by the Exit Planning Institute that trains and certifies qualified professional advisors in the field of exit planning. Exit planning is the preparation for the exit of an entrepreneur from his company to maximize the enterprise value of the company in a mergers and acquisitions transaction.

BUSINESS EXPERIENCE

08/2023 – Present	The Templeton Group, Investment Advisory Services, Asset Management and Financial Planning
08/2023 – Present	LPL Financial LLC, an Independent Broker-Dealer and Registered Investment Adviser — Registered Representative
08/2026 – Present	Great Valley Advisor Group, Investment Advisory Services, Asset Management and Financial Planning — Investment Adviser Representative
10/2023 – 08/2026	Good Life Advisors, LLC, Investment Advisory Services, Asset Management and Financial Planning — Investment Adviser Representative

Item 3 – Disciplinary Information

We must disclose any legal or disciplinary event that would be material to you when evaluating Mr. Albergotti. We have no such legal or disciplinary history to report to you.

Item 4 – Other Business Activities

Mr. Albergotti is a registered representative of LPL Financial (“LPL”), a full service broker-dealer, member FINRA/SIPC, which compensates him for effecting securities transactions. As a broker-dealer, LPL engages in a broad range of activities normally associated with securities brokerage firms. Pursuant to the investment advice given by Mr. Albergotti, investments in securities may be recommended for you. If LPL is selected as the broker-dealer, it may effect transactions in securities for you, a client of GVA and Mr. Albergotti. By serving as the broker-dealer, LPL and Mr. Albergotti may receive commissions for executing securities transactions. When Mr. Albergotti receives commissions in connection with the advice given to advisory clients, GVA may reduce a portion of its fees by the amount of the commissions earned by Mr. Albergotti.

You are advised that if LPL is selected as the broker-dealer, the transaction charges may be higher or lower than the charges you may pay if the transactions were executed at other broker-dealers. You should note, however, that you are under no obligation to purchase securities through Mr. Albergotti, GVA or LPL.

Mr. Albergotti may in his capacity as a registered representative of LPL, or as an agent appointed with various life, disability or other insurance companies, receives commissions, 12(b)-1 fees, trails, or other compensation from the respective product sponsors and/or as a result of effecting securities transactions for you. As previously noted, when commissions or

fees are received by Mr. Albergotti in connection with the advice given to you, he may, but is not obligated to, reduce its fee proportionate to the amount of the commission or fee earned by him.

Mr. Albergotti holds an insurance license to sell limited insurance products. It is anticipated that a small portion, less than (5%) of his time, will be spent providing these insurance products. He may receive compensation from selling insurance products and therefore receive economic benefit for this activity. This activity will create a conflict of interest with clients. However, since this activity represents less than 5% of his time and income, it is presumed not to be substantial.

Item 5 – Additional Compensation

The above business associations do not provide any additional compensation other than as described in GVA's Form ADV 2A.

Item 6 – Supervision

Mr. Albergotti is supervised through a compliance program designed to prevent and detect violations of the federal and state securities laws. Supervision is conducted by the Branch Manager, Kenneth Calcutt, who is responsible for administering the policies and procedures. Mr. Calcutt reviews those policies and procedures annually for their adequacy and the effectiveness of their implementation.

KENNETH CALCUTT'S CONTACT INFORMATION

Branch Manager
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