

Item 1 Cover Page

A.

Christopher Wayne Shankle

CRD # 5366366

Argent Retirement Plan Advisors, LLC

ADV Part 2B, Brochure Supplement

Dated: March 22, 2024

Contact: Carrie Brown, Chief Compliance Officer
500 E. Reynolds Dr.
Ruston, LA 71270

Telephone: 318-251-5834

Facsimile: 318-251-4651

B.

This Brochure Supplement provides information about Christopher Wayne Shankle that supplements the Argent Retirement Plan Advisors, LLC's Brochure; you should have received a copy of that Brochure. Please contact Carrie Brown, Chief Compliance Officer, if you did *not* receive Argent Retirement Plan Advisors, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Christopher Wayne Shankle is available on the SEC's website at www.adviserinfo.sec.gov

Item 2 Education Background and Business Experience

Christopher Wayne Shankle was born in 1967. Mr. Shankle graduated from the University of Mississippi in 1989, with a Bachelor of Science degree in Accountancy. Since July 2016, Mr. Shankle has been the Senior Vice President of Argent Retirement Plan Advisors, LLC. Since June 2015, Mr. Shankle has also been the Senior Vice President of Argent Trust Company. From January 2015 to

June 2015, Mr. Shankle was a registered representative of Capital One Investing, LLC and from January 1993 to June 2015, he was a Trust Officer of Capital One, N.A. From October 2008 to June 2015, Mr. Shankle was a registered representative of Capital One Investment Services, LLC.

Item 3 Disciplinary Information

None.

Item 4 Other Business Activities

- A. **Argent Trust Company.** Mr. Shankle is the Senior Vice President of Argent Trust Company, an affiliated trust company, offering financial planning, trusts, and real estate management services to families and organizations. The recommendation that a client utilize the services of Argent Trust Company presents a *conflict of interest*, as Mr. Shankle can receive compensation from Argent Trust Company based upon assets held and/or managed by Argent Trust Company. Please Note: Clients are under no obligation to engage the services of such affiliated entity.
- B. **Licensed Insurance Agent.** Mr. Shankle, in his individual capacity, is a licensed insurance agent, and may recommend the purchase of certain insurance-related products on a commission basis. Clients can engage Mr. Shankle to purchase insurance products on a commission basis. **Conflict of Interest:** The recommendation by Mr. Shankle that a client purchase an insurance commission product presents a *conflict of interest*, as the receipt of commissions may provide an incentive to recommend insurance products based on commissions to be received, rather than on a particular client's need. No client is under any obligation to purchase any insurance commission products from Mr. Shankle. Clients are reminded that they may purchase insurance products recommended by Mr. Shankle through other, non-affiliated insurance agents.

The Registrant's Chief Compliance Officer, Carrie Brown, remains available to address any questions that a client or prospective client may have regarding the above conflicts of interest.

Item 5 Additional Compensation

Mr. Shankle's annual compensation is based, in part, on the amount of assets under management and the number of clients that Mr. Shankle introduces to the Registrant. Accordingly, Mr. Shankle has a conflict of interest for recommending the Registrant to clients for investment advisory services, as the recommendation could be made on the basis of compensation to be received, rather than on a client or prospective client's best interests.

Item 6 Supervision

The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4)-7 policies and procedures is to comply with the supervision requirements of Section 203(e)(6) of the Investment Advisers Act of 1940 (the "Act"). The Registrant's Chief Compliance Officer, Carrie Brown, is primarily responsible for the implementation of the Registrant's policies and procedures and overseeing the activities of the Registrant's supervised persons. Should an employee, independent contractor, investment adviser representative, or promoter of the Registrant have any questions regarding the applicability/relevance of the Act, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Ms. Brown at 318-251-5800.

Item 1 Cover Page

A.

Mark Milton

CRD # 4650763

Argent Retirement Plan Advisors, LLC

ADV Part 2B, Brochure Supplement

Dated: March 22, 2024

Contact: Carrie Brown, Chief Compliance Officer
500 East Reynolds Drive
Ruston, Louisiana 71270

Telephone: 318-251-5800

Facsimile: 318-251-4651

B.

This Brochure Supplement provides information about Mark Milton that supplements the Argent Retirement Plan Advisors, LLC's Brochure; you should have received a copy of that Brochure. Please contact Carrie Brown, Chief Compliance Officer, if you did *not* receive Argent Retirement Plan Advisors, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Mark Milton is available on the SEC's website at www.adviserinfo.sec.gov

Item 2 Education Background and Business Experience

Mark Milton was born in 1959. Mr. Milton graduated from Southern Methodist University, Dallas Texas in 1986, with a Bachelor of Arts degree in Economics and from Mississippi College in 1981 with a master's degree in accounting. Since April 2018, Mr. Milton has been a Senior Vice President of Institutional Services at Argent Retirement Plan Advisors, LLC. From May 2016 to March 2018, Mr. Milton was the Managing Director of Wealth Services at Iberia Bank and from January 2015 to May 2016, he was the Managing Director of Deathcare Lending at Live Oak Bank.

From November 1997 to January 2015, Mr. Milton was the Executive Vice President of Institutional Services at Regions bank.

Item 3 Disciplinary Information

None.

Item 4 Other Business Activities

- A. **Argent Trust Company.** Mr. Milton is Senior Vice President of Argent Trust Company, an affiliated trust company, offering financial planning, trusts, and real estate management services to families and organizations. The recommendation that a client utilize the services of Argent Trust Company presents a *conflict of interest*, as Mr. Milton can receive compensation from Argent Trust Company based upon assets held and/or managed by Argent Trust Company. Please Note: Clients are under no obligation to engage the services of such affiliated entity. **The Registrant's Chief Compliance Officer, Carrie Brown, remains available to address any questions that a client or prospective client may have regarding the above conflict of interest.**
- A. The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

Item 5 Additional Compensation

Mr. Milton's annual compensation is based, in part, on the amount of assets under management and the number of clients that Mr. Milton introduces to the Registrant. Accordingly, Mr. Milton has a conflict of interest for recommending the Registrant to clients for investment advisory services, as the recommendation could be made on the basis of compensation to be received, rather than on a client or prospective client's best interests.

Item 6 Supervision

The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4)-7 policies and procedures is to comply with the supervision requirements of Section 203(e)(6) of the Investment Advisers Act of 1940 (the "Act"). The Registrant's Chief Compliance Officer, Carrie Brown, is primarily responsible for the implementation of the Registrant's policies and procedures and overseeing the activities of the Registrant's supervised persons. Should an employee, independent contractor, investment adviser representative, or promoter of the Registrant have any questions regarding the applicability/relevance of the Act, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Ms. Brown at 318-251-5800.

Item 1 Cover Page

A.

Thomas Michael Faherty Jr.

CRD # 7375218

Argent Retirement Plan Advisors, LLC

ADV Part 2B, Brochure Supplement

Dated: March 22, 2024

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500 East Reynolds Drive
Ruston, Louisiana 71270

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B.

This Brochure Supplement provides information about Thomas Michael Faherty Jr. that supplements the Argent Retirement Plan Advisors, LLC's Brochure; you should have received a copy of that Brochure. Please contact Carrie Brown, Chief Compliance Officer, if you did *not* receive Argent Retirement Plan Advisors, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Thomas Michael Faherty Jr. is available on the SEC's website at www.adviserinfo.sec.gov

Item 2 Education Background and Business Experience

Thomas Michael Faherty Jr. was born in 1976. Mr. Faherty graduated from Louisiana State University in 1999 with a Bachelor of Science degree in Finance. Since May 2021, Mr. Faherty has been Senior Vice President of Institutional Services at Argent Retirement Plan Advisors, LLC. From February 2016 to April 2021, Mr. Faherty was Senior Vice President and an institutional strategist of Regions Wealth Management.

Item 3 Disciplinary Information

None.

Item 4 Other Business Activities

- A. **Argent Trust Company.** Mr. Faherty is Senior Vice President of Argent Trust Company, an affiliated trust company, offering financial planning, trusts, and real estate management services to families and organizations. The recommendation that a client utilize the services of Argent Trust Company presents a *conflict of interest*, as Mr. Faherty can receive compensation from Argent Trust Company based upon assets held and/or managed by Argent Trust Company. Please Note: Clients are under no obligation to engage the services of such affiliated entity.
- B. **Licensed Insurance Agent.** Mr. Faherty, in his individual capacity, is a licensed insurance agent, and may recommend the purchase of certain insurance-related products on a commission basis. Clients can engage Mr. Faherty to purchase insurance products on a commission basis. **Conflict of Interest:** The recommendation by Mr. Faherty that a client purchase an insurance commission product presents a *conflict of interest*, as the receipt of commissions may provide an incentive to recommend insurance products based on commissions to be received, rather than on a particular client's need. No client is under any obligation to purchase any insurance commission products from Mr. Faherty. Clients are reminded that they may purchase insurance products recommended by Mr. Faherty through other, non-affiliated insurance agents.

The Registrant's Chief Compliance Officer, Carrie Brown, remains available to address any questions that a client or prospective client may have regarding the above conflicts of interest.

Item 5 Additional Compensation

Mr. Faherty's annual compensation is based, in part, on the amount of assets under management and the number of clients that Mr. Faherty introduces to the Registrant. Accordingly, Mr. Faherty has a conflict of interest for recommending the Registrant to clients for investment advisory services, as the recommendation could be made on the basis of compensation to be received, rather than on a client or prospective client's best interests.

Item 6 Supervision

The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4)-7 policies and procedures is to comply with the supervision requirements of Section 203(e)(6) of the Investment Advisers Act of 1940 (the "Act"). The Registrant's Chief Compliance Officer, Carrie Brown, is primarily responsible for the implementation of the Registrant's policies

and procedures and overseeing the activities of the Registrant's supervised persons. Should an employee, independent contractor, investment adviser representative, or promoter of the Registrant have any questions regarding the applicability/relevance of the Act, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Ms. Brown at 318-251-5800.

Item 1 Cover Page

A.

Thomas Wilson McGee Jr.

CRD # 6333091

Argent Retirement Plan Advisors, LLC

ADV Part 2B, Brochure Supplement

Dated: March 22, 2024

Contact: Carrie Brown, Chief Compliance Officer
500 East Reynolds Drive
Ruston, Louisiana 71270

Telephone: 318-251-5800

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B.

This Brochure Supplement provides information about Thomas Wilson McGee Jr. that supplements the Argent Retirement Plan Advisors, LLC's Brochure; you should have received a copy of that Brochure. Please contact Carrie Brown, Chief Compliance Officer, if you did *not* receive Argent Retirement Plan Advisors, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Thomas Wilson McGee Jr. is available on the SEC's website at www.adviserinfo.sec.gov

Item 2 Education Background and Business Experience

Thomas Wilson McGee Jr. was born in 1993. Mr. McGee graduated from Campbell University, Lundy-Fetterman School of Business in 2016 with both a Bachelor of Business Administration degree in trust and wealth management and a Master of Business Administration degree. Mr. McGee has been Vice President and a Trust Officer of Argent Retirement Plan Advisors, LLC since June 2022. He has also been Vice President and a Trust Officer of Argent Trust Company

since February 2022. From February 2017 to January 2022, He was an Institutional Trust Relationship Consultant and Assistant Vice President of Regions Bank.

Mr. McGee has held the designation of Certified Retirement Services Professional (“CRSP”) since 2020. CRSP is a professional designation administered by the Institute of Certified Bankers, a subsidiary of the American Bankers Association. In order to qualify for the CRSP designation, candidates are required to have a minimum of three years of professional experience in ERISA and IRS Code/Regulations and completion of an approved training program, or five years of ERISA and IRS Code/Regulations professional experience. Candidates must also provide a letter of recommendation attesting to ERISA and IRS Code/Regulations work experience. Candidates are additionally required to successfully pass an exam that tests a retirement services professional’s expertise in subject areas including plan type and design, laws and regulations, and investments related to retirement services. Candidates are subject to continued ethics and continuing education requirements administered by the program’s board.

Mr. McGee is certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”). Therefore, he may refer to himself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and he may use these and CFP Board’s other certification marks (the “CFP Board Certification Marks”). The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at www.cfp.net.

CFP® professionals have met CFP Board’s high standards for education, examination, experience, and ethics. To become a CFP® professional, an individual must fulfill the following requirements:

- **Education** – Earn a bachelor’s degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials. CFP Board implemented the bachelor’s degree or higher requirement in 2007 and the financial planning development capstone course requirement in March 2012. Therefore, a CFP® professional who first became certified before those dates may not have earned a bachelor’s or higher degree or completed a financial planning development capstone course.
- **Examination** – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual’s ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.
- **Experience** – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.
- **Ethics** – Satisfy the Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement and agree to be bound by CFP Board’s Code of Ethics and Standards of Conduct (“Code and Standards”), which sets forth the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements to remain certified and maintain the right to continue to use the CFP Board Certification Marks:

- **Ethics** – Commit to complying with CFP Board’s Code and Standards. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.
- **Continuing Education** – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

Item 3 Disciplinary Information

None.

Item 4 Other Business Activities

- A. **Argent Trust Company.** Mr. McGee is Vice President and a Trust Officer of Argent Trust Company, an affiliated trust company, offering financial planning, trusts, and real estate management services to families and organizations. The recommendation that a client utilize the services of Argent Trust Company presents a conflict of interest, as Mr. McGee can receive compensation from Argent Trust Company based upon assets held and/or managed by Argent Trust Company. Please Note: Clients are under no obligation to engage the services of such affiliated entities. **The Registrant’s Chief Compliance Officer, Carrie Brown, remains available to address any questions that a client or prospective client may have regarding the above conflict of interest.**
- B. The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

Item 5 Additional Compensation

Mr. McGee’s annual compensation is based, in part, on the amount of assets under management and the number of clients that Mr. McGee introduces to the Registrant. Accordingly, Mr. McGee has a conflict of interest for recommending the Registrant to clients for investment advisory services, as the recommendation could be made on the basis of compensation to be received, rather than on a client or prospective client’s best interests.

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