



FORM ADV PART 2B BROCHURE SUPPLEMENT

Jonathan Taylor

Item 1 – Cover Page

Jonathan Taylor
Patriot Asset Advisors, LLC
7889 E Broad St SW
P.O. Box 933
Pataskala, OH 43062
614-944-5225
Date of Supplement: March 6, 2024

This brochure supplement provides information about Jonathan Taylor that supplements the Patriot Asset Advisors LLC (“Advisor”) disclosure brochure. You should have received a copy of that brochure. Please contact Jonathan Taylor at 614-944-5225 if you did not receive Advisor’s brochure or if you have any questions about the contents of this supplement.

Additional information about Jonathan Taylor is available on the SEC’s website at www.adviserinfo.sec.gov.

Item 2 – Educational Background and Business Experience

Jonathan Taylor

07/03/1957
CRD # 2161627

Post Secondary Educational Background:

Ohio University, Bachelor of Science in Human Health Sciences: 1984

Business Background:

Patriot Asset Advisors, LLC, Owner and Chief Compliance Officer, 02/2018 to Present
Patriot Insurance Advisors, LLC, Chief Compliance Officer, 06/2018 to 12/2020
Cetera Investment Advisors LLC, Financial Advisor, 10/2015 – 02/2018
Summit Brokerage Services, Financial Advisor, 10/2015 to 02/2018
JP Turner and Company, Financial Advisor, 09/2011 to 09/2015

Item 3 – Disciplinary Information

Jonathan Taylor has no legal or disciplinary events to report.

Item 4 – Other Business Activities

Insurance Agent



Jonathan Taylor is independently licensed to sell insurance and annuity products through various insurance companies. When acting in this capacity, Jonathan Taylor will receive commissions for selling insurance and annuity products.

Jonathan Taylor may also receive other incentive awards for the recommendation/sale of annuities and other insurance products. The receipt of compensation and other incentive benefits may affect the judgment of Jonathan Taylor when recommending products to its clients. While Jonathan Taylor endeavors at all times to put the interest of his clients first as a part of Advisor's overall fiduciary duty to clients, clients should be aware that the receipt of commissions and additional compensation itself creates a conflict of interest, and may affect Jonathan Taylor's decision making process when making recommendations.

Clients are never obligated or required to purchase insurance products from or through Jonathan Taylor and may choose any independent insurance agent and insurance company to purchase insurance products. Regardless of the insurance agent selected, the insurance agent or agency will receive normal commissions from the sale.

Item 5 – Additional Compensation

In addition to the description of additional compensation provided in Item 4, Jonathan Taylor can receive additional benefits.

Certain product sponsors may provide Jonathan Taylor with other economic benefits as a result of his recommendation or sale of the product sponsors' investments. The economic benefits received by Jonathan Taylor from product sponsors can include but are not limited to, financial assistance or the sponsorship of conferences and educational sessions, marketing support, incentive awards, payment of travel expenses, and tools to assist Jonathan Taylor in providing various services to clients.

Although Advisor and Jonathan Taylor endeavor at all times to put the interest of its clients ahead of its own or those of its officers, directors, or representatives ("affiliated persons"), these arrangements could affect the judgment of Jonathan Taylor when recommending investment products. These situations present a conflict of interest that may affect the judgment of affiliated persons including Jonathan Taylor.

Item 6 – Supervision

Jonathan Taylor is the Chief Compliance Officer of Advisor. He is responsible for overseeing and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives. Jonathan Taylor can be contacted at 614-944-5225.

Item 7 – Requirements for State-Registered Advisers

Jonathan Taylor has not been involved in an arbitration award and has not been found liable in an arbitration claim alleging damages in excess of \$2,500. He has not been involved in any award or found liable in any civil, self-regulatory organization, or administrative proceeding. Additionally, he has not been the subject of a bankruptcy petition.