

**Item 1 Cover Page**

A.

**R. Brad Knowles**

CRD # 4398143

Argent Retirement Plan Advisors, LLC  
DBA: Heritage Retirement Plan Advisors

ADV Part 2B, Brochure Supplement  
Dated: July 7, 2021

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 R. Brad Knowles 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 R. Brad Knowles is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov)**

**Item 2 Education Background and Business Experience**

R. Brad Knowles was born in 1973. Mr. Knowles graduated from the University of Oklahoma in 1996, with a Bachelor of Art & Sciences degree in Sports Sciences from the University of Oklahoma, Price College of Business in 2002, with a Master of Business Administration degree in Finance. Since October 2012, Mr. Knowles has been the Managing Director, Chief Compliance

Officer and an investment adviser representative of Argent Retirement Plan Advisors, LLC. From February 2009 to October 2012, Mr. Knowles was a Managing Partner of RBK Capital, LLC.

### Item 3 Disciplinary Information

None.

### Item 4 Other Business Activities

- A. The supervised person is not actively engaged in any investment-related business or occupation.
- B. **Licensed Insurance Agent.** Mr. Knowles, 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. Knowles to purchase insurance products on a commission basis. **Conflict of Interest:** The recommendation by Mr. Knowles 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. Knowles. Clients are reminded that they may purchase insurance products recommended by Mr. Knowles 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 conflict of interest.**

### Item 5 Additional Compensation

None.

### 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 solicitor 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.

**Christopher W. Shankle**

CRD # 5366366

Argent Retirement Plan Advisors, LLC

ADV Part 2B, Brochure Supplement

Dated: July 7, 2021

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

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B.

**This Brochure Supplement provides information about Christopher W. 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 W. Shankle is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov)**

**Item 2 Education Background and Business Experience**

Christopher W. 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 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**

None.

### **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 solicitor 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

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500 East Reynolds Drive  
Ruston, Louisiana 71270

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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](http://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. The supervised person is not actively engaged in any other investment-related businesses or occupations.
- B. The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

### **Item 5 Additional Compensation**

None.

### **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 solicitor 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.

**Ryan C. Barnett**

CRD # 6231436

Argent Retirement Plan Advisors, LLC  
DBA: Heritage Retirement Plan Advisors

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500 E. Reynolds Dr.  
Ruston, LA 71270

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B.

**This Brochure Supplement provides information about Ryan C. Barnett 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 Ryan C. Barnett is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov)**

**Item 2 Education Background and Business Experience**

Ryan C. Barnett was born in 1979. Mr. Barnett graduated from the University of Oklahoma at Norman in 2001, with a Bachelor of Business Administration degree in Marketing with a minor in Management and from the University of Tulsa, College of Law in 2006 with a Juris Doctorate

degree. Since January 2019, Mr. Barnett has been an investment adviser representative of Argent Retirement Plan Advisors, LLC. From January 2013 to December 2018, Mr. Barnett was a consultant with Asset Services Company and he was also a retirement plan account coordinator with InvesTrust, N.A. from January 2013 to December 2014. From February 2014 to December 2018, Mr. Barnett was a Trust/Compliance Officer and from January 2016 to December 2018, he was also the Director of Retirement Plan Services for InvesTrust.

### **Item 3 Disciplinary Information**

None.

### **Item 4 Other Business Activities**

- A. The supervised person is not actively engaged in any investment-related business or occupation.
- B. The supervised person is not actively engaged in any noninvestment-related business or occupation.

### **Item 5 Additional Compensation**

None.

### **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 solicitor 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.

**Linde A. Murphy**

CRD # 4049529

Argent Retirement Plan Advisors, LLC

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500 East Reynolds Drive  
Ruston, Louisiana 71270

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Facsimile: 318-251-4651

B.

**This Brochure Supplement provides information about Linde A. Murphy 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 Linde A. Murphy is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov)**

**Item 2 Education Background and Business Experience**

Linde A. Murphy was born in 1977. Ms. Murphy graduated from American University in 1998, with a Bachelor of Science degree in Business Administration with a focus in International Finance. Since March 2018, Ms. Murphy has been an investment adviser representative of Argent Retirement Plan Advisors, LLC and a market liaison of Argent Trust Company. Since November 2012, Ms. Murphy has also been a CCO and broker dealer representative of ME Allison & Co., Inc. From November 2012 to March 2018, Ms. Murphy was the COO of ME

Allison & Co., Inc. From May 2012 to March 2013, Ms. Murphy was the CCO of Presidio Financial Services, Inc., which merged into M.E. Allison & Co., Inc.

### Item 3 Disciplinary Information

None.

### Item 4 Other Business Activities

- A. **Argent Trust Company.** Ms. Murphy is a market liaison 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 Ms. Murphy 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.

**Registered Representative of ME Allison & Co., Inc.** Ms. Murphy is a registered representative and serves as Chief Compliance Officer of ME Allison & Co., Inc. (“MEA”), an SIPC and FINRA member broker-dealer.

**Member of FINRA Board of Governors.** Ms. Murphy, in her individual capacity, is a Member of the FINRA Board of governors which regulates member brokerage firms and exchange markets. She spends more than 10% of time with and earns more than 10% of her earnings with 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.**

- B. **Licensed Insurance Agent.** Ms. Murphy, in her individual capacity, is a licensed insurance agent, and may recommend the purchase of certain insurance-related products on a commission basis. Clients can engage Ms. Murphy to purchase insurance products on a commission basis. **Conflict of Interest:** The recommendation by Ms. Murphy 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 Ms. Murphy. Clients are reminded that they may purchase insurance products recommended by Ms. Murphy 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 conflict of interest.**

## **Item 5 Additional Compensation**

None.

## **Item 6 Supervision**

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**Item 1 Cover Page**

A.

**Jeffery G. Bradley**

CRD # 7294189

Argent Retirement Plan Advisors, LLC  
DBA: Heritage Retirement Plan Advisors

ADV Part 2B, Brochure Supplement  
Dated: July 7, 2021

Contact: Carrie Brown, Chief Compliance Officer  
500 E. Reynolds Dr.  
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B.

**This Brochure Supplement provides information about Jeffery G. Bradley 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 Jeffery G. Bradley is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov)**

**Item 2 Education Background and Business Experience**

Jeffery G. Bradley was born in 1974. Mr. Bradley graduated from Campbell University of in 1997, with a Bachelor of Business Administration degree in Trust and wealth Management.

Since September 2020, Mr. Bradley has been the Senior Vice President of Institutional Services. From July 2010 to February 2020, Mr. Bradley was a Senior Vice President of Regions Bank.

### **Item 3 Disciplinary Information**

None.

### **Item 4 Other Business Activities**

- A. The supervised person is not actively engaged in any investment-related business or occupation.
- B. The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

### **Item 5 Additional Compensation**

None.

### **Item 6 Supervision**

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**Item 1 Cover Page**

A.

**Thomas Michael Faherty Jr.**

CRD # 7375218

Argent Retirement Plan Advisors, LLC

ADV Part 2B, Brochure Supplement

Dated: July 7, 2021

Contact: Carrie Brown, Chief Compliance Officer  
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](http://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. The supervised person is not actively engaged in any other investment-related businesses or occupations.
- 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 conflict of interest.**

### Item 5 Additional Compensation

None.

### 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 solicitor 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.