

# Brochure Supplement

## Form ADV Part 2B

**Joshua R. Axel**

**CRD# 4227334**

August 29, 2025

This Brochure Supplement provides information about Joshua R. Axel that supplements KTF Investments, LLC ADV Part 2A Wrap Brochure. You should have received a copy of that Brochure. Please contact Karey Williams Chief Compliance Officer at (513) 618-4498 if you did not receive a KTF Investments, LLC Brochure or if you have any questions about the contents of this Supplement.

Additional information about Mr. Axel is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## ITEM 2

### **Educational Background and Business Experience**

Joshua R. Axel (year of birth 1978) is a Principal Owner of KTF Investments, LLC.

Education:

Cal Poly San Luis Obispo – Bachelor of Science in Business Finance June 2000

Employment History:

UBS Financial Services – Investment Adviser – 06/2000 to 8/2025

## ITEM 3

### **Disciplinary Information**

Mr. Axel has no material disciplinary information to disclose for the past 10 years. For more information regarding Mr. Axel, please visit [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## ITEM 4

### **Other Business Activities**

Mr. Axel does not engage in any outside business activities.

## ITEM 5

### **Additional Compensation**

Mr. Axel does not receive any additional compensation.

## ITEM 6

### **Supervision**

Mr. Axel's activities related to investment advisory services provided are supervised by the Investment Committee. If you have any questions or concerns, you can contact us at 513-618-4498.

# Brochure Supplement

## Form ADV Part 2B

**Allen R. Mellow**

**CRD# 331642**

August 29, 2025

This Brochure Supplement provides information about Allen R. Mellow that supplements KTF Investments, LLC ADV Part 2A Wrap Brochure. You should have received a copy of that Brochure. Please contact Karey Williams Chief Compliance Officer at (513) 618-4498 if you did not receive a KTF Investments, LLC Brochure or if you have any questions about the contents of this Supplement.

Additional information about Mr. Mellow is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

**ITEM 2**

## **Educational Background and Business Experience**

Allen R. Mellow (1939) is a (add position) of KTF Investments, LLC.

Education:

BA in Economics from California State University, Long Beach

Employment History:

UBS Financial Services, Inc. – Advisor – 1/1984 to 8/2025

**ITEM 3**

## **Disciplinary Information**

Mr. Mellow has no material disciplinary information to disclose for the past 10 years.

For more information regarding Mr. Mellow, please visit [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

**ITEM 4**

## **Other Business Activities**

Mr. Mellow does not engage in any outside business activities.

**ITEM 5**

## **Additional Compensation**

Mr. Mellow does not receive any additional compensation.

**ITEM 6**

## **Supervision**

Mr. Mellow's activities related to investment advisory services provided are supervised by the Investment Committee. If you have any questions or concerns, you can contact us at 513-618-4498.

# Brochure Supplement

## Form ADV Part 2B

**Jess D. Sansone**

**CRD# 7810715**

August 29, 2025

This Brochure Supplement provides information about Jess D. Sansone that supplements KTF Investments, LLC ADV Part 2A Wrap Brochure. You should have received a copy of that Brochure. Please contact Karey Williams Chief Compliance Officer at (513) 618-4498 if you did not receive a KTF Investments, LLC Brochure or if you have any questions about the contents of this Supplement.

Additional information about Mr. Sansone is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## ITEM 2

### **Educational Background and Business Experience**

Jess D. Sansone (year of birth 1976) is a Principal Owner of KTF Investments, LLC.

Education:

Bachelor of Science in Economics with Concentrations in Finance and Quantitative Analysis

CFA Institute – Chartered Financial Analyst Program – Passed all 3 levels

Employment History:

UBS Financial Services – Investment Adviser – 10/2023 to 8/2025

Big West Distribution, Inc – President – 4/2010 – 9/2023

Big Spoon Yogurt, Inc – CEO – 9/2005-9/2023

Apple Computer – Finance Manager – 6/2000 – 4/2008

## ITEM 3

### **Disciplinary Information**

Mr. Sansone has no material disciplinary information to disclose for the past 10 years. For more information regarding Mr. Sansone, please visit [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## ITEM 4

### **Other Business Activities**

Mr. Sansone does not engage in any outside business activities.

## ITEM 5

### **Additional Compensation**

Mr. Sansone does not receive any additional compensation.

## ITEM 6

### **Supervision**

Mr. Sansone's activities related to investment advisory services provided are supervised by the Investment Committee. If you have any questions or concerns, you can contact us at 513-618-4498.