

# Premier Wealth Advisors LLC

## Form ADV Part 2B Brochure Supplement for Joe LeBlanc, EA, CFP®

Address: 12531 High Bluff Drive  
Suite 110  
San Diego, CA 92130

Phone: (858) 668-0776

Email: [joe@mypremierwealth.com](mailto:joe@mypremierwealth.com)

Website: <http://mypremierwealth.com/>

This brochure supplement provides information about Joe LeBlanc that supplements the Premier Wealth Advisors LLC brochure. You should have received a copy of that brochure. Please contact Joe LeBlanc if you did not receive Premier Wealth Advisors LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Joe LeBlanc is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) and by searching for CRD# 2569112.

## Item 2: Educational Background & Business Experience

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Name: Joseph LeBlanc

Year of Birth: 1965

Education: Bachelor of Science (Chemistry), Rensselaer Polytechnic Institute, 1987  
Master of Business Administration (emphasis in International Finance), National University, 1995

Business Background: Managing Partner  
Premier Wealth Advisors LLC  
September 2018 to Present

Investment Adviser Representative  
Independent Financial Group, LLC  
December 2006 to Present

Registered Representative  
Independent Financial Group, LLC  
May 2004 to Present

Professional Designations: Certified Financial Planner (“CFP®”)

The CFP® certification is a financial planning credential awarded by the Certified Financial Planner Board of Standards Inc. In order to earn and maintain the CFP® designation, individuals must meet the initial certification components of (i) education relevant to the professional, competent, and ethical provision of financial planning services, (ii) pass the certification examination, (iii) attain three years of professional experience, (iv) pass a background check and disclose certain occurrences, (v) complete thirty hours of continuing education every two years, (vi) submit a certification application every two years, and (vii) pay an annual certification fee. Further information about the qualifications and standards required of a CFP may be found by visiting the CFP Board of Standard’s website at <http://www.cfp.net/>.

### Enrolled Agent

An EA is a federally-authorized tax practitioner who has technical expertise in the field of taxation and who is empowered by the U.S. Department of the Treasury to represent taxpayers before all administrative levels – examination, collection, and appeals – of the Internal Revenue Service (“IRS”). In addition to taxpayer representation, enrolled agents can provide tax consultation services and prepare a wide range of federal and state tax returns.

To become an EA, one must either (1) work for the IRS for five years in a position requiring the interpretation of the tax code; or (2) pass all three parts of the Special Enrollment Exam (SEE) and pass a background check. EAs must adhere to ethical standards and complete 72 hours of continuing education courses every three years. Further information

about the qualifications and standards required of an EA may be found by visiting the IRS website at <https://www.irs.gov/tax-professionals/enrolled-agents/enrolled-agent-information>.

## Item 3: Disciplinary Information

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There are no legal or disciplinary events material to a client's or prospective client's evaluation of Joe LeBlanc.

## Item 4: Other Business Activities

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- A. Joe LeBlanc is actively engaged as a registered representative and investment adviser representative of Independent Financial Group, LLC, a broker-dealer and investment adviser independent from Premier Wealth Advisors LLC, and from time to time will earn an ordinary and customary commission from the sale of a security in such capacity. This creates a conflict of interest, because Joe LeBlanc has the potential to earn both commission and advisory fee revenue from a client. Joe LeBlanc addresses this conflict of interest by fully disclosing his relationship with Independent Financial Group, LLC, and informing clients that they are under no obligation to purchase a security through him.
  
- B. Joe LeBlanc is a licensed insurance agent and from time to time will earn an ordinary and customary commission from the sale of an insurance product in such capacity. This creates a conflict of interest, because Joe LeBlanc has the potential to earn both an insurance commission and advisory fee revenue from a client. Joe LeBlanc addresses this conflict of interest by fully disclosing his relationship with the applicable insurance provider, and informing clients that they are under no obligation to purchase an insurance product through him.

## Item 5: Additional Compensation

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Joe LeBlanc does not receive any economic benefit from any third-party other than clients for providing advisory services. Such economic benefits are conveyed through Premier Wealth Advisors LLC.

However, it should be noted that Joe LeBlanc is compensated by Independent Financial Group, LLC in his capacity as a registered representative and investment adviser representative for the sale of securities. From time to time, such compensation will be contingent on achieving certain securities sales thresholds (which may or may not be met), in consideration for attending certain educational or training conferences, and in consideration for hosting certain seminars or presentations for clients or prospective clients. These forms of compensation from Independent Financial Group, LLC create a conflict of interest, because Joe LeBlanc may feel incentivized to recommend certain products and services of Independent Financial Group, LLC over other comparable product and service providers. Joe LeBlanc addresses this conflict of interest by fully disclosing his relationship with and compensation from Independent Financial Group, LLC, and informing clients that they are under no obligation to purchase any product or service through him or Independent Financial Group, LLC.

## Item 6: Supervision

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Joe LeBlanc is supervised and monitored by Josh Koehnen, Managing Partner, pursuant to Premier Wealth Advisor's written policies and procedures and code of ethics. Josh Koehnen may be reached at [josh@mypremierwealth.com](mailto:josh@mypremierwealth.com).