

# Premier Wealth Advisors LLC

## Form ADV Part 2B Brochure Supplement for Ari Crandall, EA, CFP®

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This brochure supplement provides information about Ari Crandall that supplements the Premier Wealth Advisors LLC brochure. You should have received a copy of that brochure. Please contact Ari Crandall 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 Ari Crandall is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) and by searching for CRD# 2911716.

## Item 2: Educational Background & Business Experience

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Name: Ari Crandall

Year of Birth: 1976

Education: Bachelor of Science (Business Administration – Financial Services);  
Certificate in Personal Financial Planning, San Diego State University,  
1999

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

Investment Adviser Representative  
Independent Financial Group, LLC  
October 2005 to Present

Registered Representative  
Independent Financial Group, LLC  
July 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 Ari Crandall.

## Item 4: Other Business Activities

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- A. Ari Crandall 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 Ari Crandall has the potential to earn both commission and advisory fee revenue from a client. Ari Crandall 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. Ari Crandall 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 Ari Crandall has the potential to earn both an insurance commission and advisory fee revenue from a client. Ari Crandall 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.
- C. Ari Crandall is an independent agent of Premier Realty Solutions, Inc., which offers real estate brokerage and property management services in San Diego County, and from time to time will earn an ordinary and customary commission from the sale of real estate in such capacity. This creates a conflict of interest, because Ari Crandall has the potential to earn both a real estate-related commission and advisory fee revenue from a client. Ari Crandall addresses this conflict of interest by fully disclosing his relationship with Premier Realty, and informing clients that they are under no obligation to purchase any real estate or property management services through him.

## Item 5: Additional Compensation

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Ari Crandall 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 Ari Crandall 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 creates a conflict of interest, because Ari Crandall may feel incentivized to recommend certain products and services of Independent Financial Group, LLC over other comparable product and service providers. Ari Crandall 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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Ari Crandall is supervised and monitored by Joe LeBlanc, Managing Partner and Chief Compliance Officer, pursuant to Premier Wealth Advisor's written policies and procedures and code of ethics. Joe LeBlanc may be reached at [joe@mypremierwealth.com](mailto:joe@mypremierwealth.com).