

*This brochure supplement provides information about Dustin Thackeray that supplements the Crewe Capital Advisors LLC brochure. You should have received a copy of that brochure. Please contact Dustin Thackeray if you did not receive Crewe Capital Advisors LLC's brochure or if you have any questions about the contents of this supplement.*

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

## **Crewe Capital Advisors LLC**

### **Form ADV Part 2B – Individual Disclosure Brochure**

*for*

### **Dustin Chad Thackeray**

Personal CRD Number: 4878110

Investment Adviser Representative

Crewe Capital Advisors LLC  
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UPDATED: 04/28/2015

## **Item 2: Educational Background and Business Experience**

**Name:** Dustin Chad Thackeray

**Born:** 1979

### **Educational Background and Professional Designations:**

#### **Education:**

Bachelor of Science Business Administration/Finance, Weber State University - 2004

#### **Designations:**

##### **CFA - Chartered Financial Analyst**

The Chartered Financial Analyst (CFA) charter is a globally respected, graduate-level investment credential established in 1962 and awarded by CFA Institute - the largest global association of investment professionals.

There are currently more than 90,000 CFA charterholders working in 134 countries. To earn the CFA charter, candidates must: 1) pass three sequential, six-hour examinations; 2) have at least four years of qualified professional investment experience; 3) join CFA Institute as members; and 4) commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct.

##### **High Ethical Standards**

The CFA Institute Code of Ethics and Standards of Professional Conduct, enforced through an active professional conduct program, require CFA charterholders to:

- Place their clients' interests ahead of their own
- Maintain independence and objectivity
- Act with integrity
- Maintain and improve their professional competence
- Disclose conflicts of interest and legal matters

##### **Global Recognition**

Passing the three CFA exams is a difficult feat that requires extensive study (successful candidates report spending an average of 300 hours of study per level). Earning the CFA charter demonstrates mastery of many of the advanced skills needed for investment analysis and decision making in today's quickly evolving global financial industry. As a result, employers and clients are increasingly seeking CFA charterholders-often making the charter a prerequisite for employment.

Additionally, regulatory bodies in 22 countries and territories recognize the CFA charter as a proxy for meeting certain licensing requirements, and more than 125 colleges and universities around the world have incorporated a majority of the CFA Program curriculum into their own finance courses.

### **Comprehensive and Current Knowledge**

The CFA Program curriculum provides a comprehensive framework of knowledge for investment decision making and is firmly grounded in the knowledge and skills used every day in the investment profession. The three levels of the CFA Program test a proficiency with a wide range of fundamental and advanced investment topics, including ethical and professional standards, fixed-income and equity analysis, alternative and derivative investments, economics, financial reporting standards, portfolio management, and wealth planning.

The CFA Program curriculum is updated every year by experts from around the world to ensure that candidates learn the most relevant and practical new tools, ideas, and investment and wealth management skills to reflect the dynamic and complex nature of the profession.

To learn more about the CFA charter, visit [www.cfainstitute.org](http://www.cfainstitute.org).

### **Business Background:**

02/2015 - Present	Chief Compliance Officer Chief Investment Officer Investment Adviser Representative Crewe Capital Advisors LLC
07/2013 - Present	Minority Owner City Creek Capital LLC
01/2015 to Present	Managing Member T2 Capital, LLC
06/2006 - 01/2015	Director and Investment Adviser Representative Wealth Navigation, LLC
01/2014 - 01/2015	Registered Representative Arete Wealth Management, LLC
03/2009 - 07/2012	Registered representative Arete Wealth Management, LLC
06/2006 - 03/2009	Registered Representative Private Consulting Group

10/2004 - 06/2006

Investment Advisor  
Lincoln Financial Advisors

### **Item 3: Disciplinary Information**

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

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

Dustin Thackeray is a minority owner of an equipment leasing fund, City Creek Capital LLC, and is also involved in the administration of the fund. From time to time, he may offer clients advice or products from those activities and clients should be aware that these services may involve a conflict of interest. Crewe Capital Advisors LLC always acts in the best interest of the client and clients are in no way required to utilize the services of any representative of Crewe Capital Advisors LLC in such individual's outside capacities.

### **Item 5: Additional Compensation**

Dustin Thackeray may receive some economic benefit from City Creek Capital in exchange for providing clients advisory services through Crewe Capital Advisors LLC.

### **Item 6: Supervision**

Dustin Thackeray is CCO and CIO of Crewe Capital Advisors LLC, and works closely with Managing Member Ryan Halliday. Dustin Thackeray adheres to all required regulations regarding the activities of an Investment Adviser Representative and follows all policies and procedures outlined in the firm's policies and procedures manual, including the Code of Ethics, and appropriate securities regulatory requirements.