

*This brochure supplement provides information about Linda K. Bright that supplements the Precept Advisory Group LLC brochure. You should have received a copy of that brochure. Please contact Linda K. Bright, Investment Advisor if you did not receive Precept Advisory Group LLC's brochure or if you have any questions about the contents of this supplement.*

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

# **Precept Advisory Group LLC**

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

*for*

**Linda K. Bright**  
Investment Adviser Representative

Precept Advisory Group LLC  
130 Theory, Suite 200  
Irvine, California, 92617  
(949) 679-2147  
[www.preceptadvisory.com](http://www.preceptadvisory.com)  
[lindab@preceptadvisory.com](mailto:lindab@preceptadvisory.com)

UPDATED: 12/22/2015

## Item 2: Educational Background and Business Experience

**Name:** Linda K. Bright

**Born:** 1969

### **Education Background and Professional Designations:**

#### **Education:**

BA Business Economics, University of California, Santa Barbara – 1991

#### **Designations:**

##### **CRA - Certified Retirement Administrator**

##### **CRA Minimum Qualifications**

- Candidates pursuing this designation must first have three years of related professional experience, and then take a self-study test followed by an examination. Fifteen hours of continued education must be completed each year. Most candidates have backgrounds in human resources, financial services, government agencies or corporations with retirement plans.

#### **Business Background:**

2010 – Present

Senior Vice President  
Precept Advisory Group LLC

1998 – 2010

Director, Retirement Consulting  
F.B.P. Insurance Services, Inc. dba: Precept Group

### **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**

Linda K. Bright is a Director in the Precept Group Retirement Plan Services business unit for F.B.P. Insurance Services, Inc. From time to time, she will offer clients investment analysis, administrative services and/or products from those activities. PAG is a fee-for-service investment advisory firm. PAG does not receive any commission from any products. PAG's sole source of revenue is fees paid directly from Plan sponsors. Ms. Bright is not engaged in any investment-related business or occupation (other than this advisory firm).

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

Other than salary, annual bonuses, regular bonuses, Linda K. Bright does not receive any economic benefit from any person, company, or organization, in exchange for providing clients advisory services through Precept Advisory Group LLC.

### **Item 6: Supervision**

As the Senior Vice President and representative of Precept Advisory Group LLC, Linda K. Bright supervises all duties and activities of the firm. Linda K. Bright's contact information is on the cover page of this disclosure document. Linda K. Bright 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.