

## **Chandler Moerbe**

**CRD # 7091472**

## **Privus Financial, LLC**

13155 Noel Road, Suite 2400  
Dallas, TX 75240

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[www.privusfinancial.com](http://www.privusfinancial.com)

**July 31, 2019**

### **Form ADV Part 2B – Brochure Supplement**

This Brochure Supplement provides information about Chandler Moerbe that supplements the Privus Financial, LLC (hereinafter, "Privus") Brochure. You should have received a copy of that Brochure. Please contact our office at (512) 630-5055 if you did not receive Privus Financial, LLC's Brochure or if you have any questions about the contents of this supplement.

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

### Educational Background and Business Experience - Item 2

**Chandler Moerbe**

**Year of Birth:** 1993

**Formal Education After High School:**

- Texas A&M University, BBA – Accounting, 2015
- Texas A&M University, MS – Taxation, 2016

**Business Background for the Preceding 5 Years:**

- Privus Financial, LLC, Chief Compliance Officer, 03/2019 to Present.
- Privus Financial, LLC, CPA, 11/2018 to Present.
- Ernst & Young US LLP, Tax Staff, 10/2016 to 10/2018

**Professional Designations Qualifications:**

CPA – Certified Public Accountant, Texas

In Texas, the Texas State Board of Public Accountancy (TSBPA) sets requirements to become a CPA. It requires a bachelor's or graduate degree from an approved college, 30 semester hours of courses that meet the board's approval and a concentration in accounting that satisfies TSBPA rules. The applicant must also pass an ethics class and then an exam to become a CPA.

The TSBPA issues a certificate to individuals who meet the following criteria:

- Be of good moral character.
- Pass the CPA Exam.
- Meet the work experience requirements - One year of experience is required and shall consist of full- or part-time employment that extends over a period of not less than one year and not more than three years and includes not fewer than 2000 hours of performance of services.
- Pass an exam on the Board's Rules of Professional Conduct.

The CPA licensee shall complete at least 120 hours of Continuing Professional Education ("CPE") in each three-year period, and a minimum of 20 hours in each one-year period.

### Disciplinary Information - Item 3

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of Chandler Moerbe and Privus. Chandler Moerbe has no history of legal or disciplinary events.

### Other Business Activities - Item 4

Chandler Moerbe does not engage in other business activities outside of Privus.

### Additional Compensation – Item 5

Apart from the receipt of additional compensation listed above under Item 4, Ms. Moerbe does not receive additional compensation or economic benefits from third party sources in connection with her advisory activities.

**Supervision - Item 6**

Ms. Moerbe serves as the Chief Compliance Officer of Privus. Ms. Moerbe's full contact information is included on the cover of this Brochure Supplement.

Privus has implemented a Code of Ethics and an internal compliance program that guides each Associated Person in meeting their fiduciary obligations to clients of Privus. Chandler Moerbe, CCO is responsible for maintaining the company's code of ethics and compliance program.

Privus is subject to regulatory oversight by various agencies. These agencies require registration by Privus and its employees. As a registered entity, Privus is subject to examinations by regulators, which may be announced or unannounced. Privus is required to periodically update the information provided to these agencies and to provide various reports regarding firm business and assets.

**Requirements for State-Registered Advisers - Item 7**

Ms. Moerbe does not have any reportable arbitration claims, has not been found liable in a reportable civil, self-regulatory organization or administrative proceeding, and has not been the subject of a bankruptcy petition.