

Part 2B of Form ADV: *Brochure Supplement*

Item 1 Cover Page

Jay Harrell  
Crescent Advisor Group, Inc.  
d/b/a Lowell Wealth Management  
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Lubbock, TX 79424

Part 2B of Form ADV - Brochure Supplement

December 26, 2024

**This brochure supplement provides information about Jay Harrell that supplements the Crescent Advisor Group, Inc. brochure. You should have received a copy of that brochure. Please contact Crescent Advisor Group, Inc. if you did not receive Crescent Advisory Group, Inc.'s brochure or if you have any questions about the contents of this supplement.**

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

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

Born 1959

Texas Tech University BA degree, 1983

Crescent Securities Group, Inc. 2019 to present - Registered Representative

Harrell Investments, LLC - Investment Advisor Representative

Lowell and Company Inc. Securities 2003 to 2019 – Registered Representative

Manage/Owned Medical Services Business 15 years, private investor 30 years

Registered Representative, General Securities Representative, Insurance Representative

## **Item 3 Disciplinary Information**

No information to report.

## **Item 4 Other Business Activities**

Mr. Harrell is a registered representative of Crescent Securities Group, Inc. and is an insurance producer. He is also an investment advisor representative with Harrell Investments, LLC, though there are no plans for any activity in this entity. Mr. Harrell also owns passive investments.

## **Item 5 Additional Compensation**

Mr. Harrell is also compensated on a commission basis by Crescent Securities Group, Inc. for brokerage transactions.

## **Item 6 Supervision**

Investment Advisor Representatives are supervised on an ongoing basis. All advisory accounts are monitored on a systematic random basis, are reviewed by the investment advisor representative, and reviewed no less than quarterly by a designated principal of the firm. More active accounts and larger accounts may be reviewed on a more frequent basis.

Supervision of investment advisor representatives consist of reviews of advisory accounts on a transactional basis to insure that each transaction is (1) suitable to the respective client's investment objectives; (2) meets that client's quality standards; and (3) to make certain the activity is consistent with their financial profile.

All communications with advisory clients are also monitored and reviewed on an on-going basis to ensure the investment advice being given is appropriate for each advisory client.

## **Person Responsible for Supervision of Investment Advisor Representative**

Nick Duren

President  
(972) 490-0150