

Part 2B of Form ADV: *Brochure Supplement*

Item 1 Cover Page

Jon Bolt
Crescent Advisor Group, Inc.
d/b/a/ Castle Financial LLC
6905 82nd Street #100
Lubbock, TX 79424

Part 2B of Form ADV - Brochure Supplement

December 26, 2024

This brochure supplement provides information about Jon Bolt 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 Jon Bolt is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2, Educational Background and Business Experience

Born 1988

South Plains College 2015 Associates in Business Administration

Texas Tech University 2020 Bachelor of Science

Personal Financial Planning Crescent Advisor Group 2019 to present

Registered Representative Crescent Securities Group, Inc. 2019 to present

Personal Financial Planning Lowell and Company Inc. 2019

Registered Representative Lowell and Company Inc. 2019

Registered Representative, General Securities Representative, Investment Advisor Representative, Insurance Representative

Item 3 Disciplinary Information

No information to report.

Item 4 Other Business Activities

Mr. Bolt is a registered representative of Crescent Securities Group, Inc. and is an insurance producer.

Item 5 Additional Compensation

Mr. Bolt's compensation is provided by Castle Financial LLC. The sources of that compensation are investment advisory fees. Mr. Bolt 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 ensure 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