

Part 2B of Form ADV: *Brochure Supplement*

Item 1 Cover Page

Tyler Castle, CFP®
Crescent Advisor Group, Inc.
d/b/a Lowell Wealth Management
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 Tyler Castle 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 Tyler Castle is available on the SEC's website at www.adviserinfo.sec.gov and on the CFP® Board's website at <https://www.cfp.net>.

Item 2, Educational Background and Business Experience

Born 1988
Texas Tech University 2015 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. 2016 to 2019
Registered Representative Lowell and Company Inc. 2016 to 2019
Registered Representative, General Securities Representative, Insurance Representative.
CERTIFIED FINANCIAL PLANNER™ practitioner.

Item 3 Disciplinary Information

No information to report.

Item 4 Other Business Activities

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

Item 5 Additional Compensation

Nothing to report

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