

This brochure supplement provides information about James Crandell Long that supplements the Excel Financial LLC brochure. You should have received a copy of that brochure. Please contact James Crandell Long, IAR if you did not receive Excel Financial LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about James Crandell Long is also available on the SEC's website at www.adviserinfo.sec.gov.

Excel Financial LLC
Form ADV Part 2B – Individual Disclosure Brochure
for
James Crandell Long
Investment Adviser Representative

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UPDATED: 1/29/2016

Item 2: Educational Background and Business Experience

Name: James Crandell Long

Born: 1951

Education Background and Professional Designations:

Education:

BBA Management, St. Bonaventure University – 1973

Designations:

CPA - Certified Public Accountant*

- CPAs are licensed and regulated by their state boards of accountancy. While state laws and regulations vary, the education, experience and testing requirements for licensure as a CPA generally include minimum college education (typically 150 credit hours with at least a baccalaureate degree and a concentration in accounting), minimum experience levels (most states require at least one year of experience providing services that involve the use of accounting, attest, compilation, management advisory, financial advisory, tax or consulting skills, all of which must be achieved under the supervision of or verification by a CPA), and successful passage of the Uniform CPA Examination.
- In order to maintain a CPA license, states generally require the completion of 40 hours of continuing professional education (CPE) each year (or 80 hours over a two year period or 120 hours over a three year period). Additionally, all American Institute of Certified Public Accountants (AICPA) members are required to follow a rigorous Code of Professional Conduct which requires that they act with integrity, objectivity, due care, competence, fully disclose any conflicts of interest (and obtain client consent if a conflict exists), maintain client confidentiality, disclose to the client any commission or referral fees, and serve the public interest when providing financial services. The vast majority of state boards of accountancy have adopted the AICPA's Code of Professional Conduct within their state accountancy laws or have created their own.

PFS®- Personal Financial Specialist

The PFS credential demonstrates that an individual has met the minimum education, experience and testing required of a CPA in addition to a minimum level of expertise in personal financial planning. To attain the PFS credential, a candidate must hold an unrevoked CPA license, fulfill 3,000 hours of personal financial planning business experience, complete 80 hours of personal financial planning CPE credits, pass a comprehensive financial planning exam and be an active member of the AICPA.

A PFS credential holder is required to adhere to AICPA's Code of Professional Conduct, and is encouraged to follow AICPA's Statement on Responsibilities in Financial Planning Practice. To maintain their PFS credential, the recipient must complete 60 hours of financial planning CPE credits every three years. The PFS credential is administered through the AICPA.

*This description represents the requirements as of 1/1/2011. It is the responsibility of the adviser to disclose the qualifications in place when he or she attained the credential.

Business Background:

2009 – Present	IAR Excel Financial LLC
2009 – Present	Member Moran & Long, LLC
2003 – Present	CEO Red Wing Software, Inc.

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

James Crandell Long is a member of the CPA firm Moran & Long, LLC which provides accounting and tax services. James Crandell Long is also the chief executive officer of Red Wing Software, Inc. From time to time, he will offer clients advice or products from those activities. Excel always acts in the best interest of the client.

Item 5: Additional Compensation

Other than salary, annual bonuses, regular bonuses, James Crandell Long does not receive any economic benefit from any person, company, or organization, in exchange for providing clients advisory services through Excel Financial LLC.

Item 6: Supervision

As a representative of Excel Financial LLC, James Crandell Long works closely with his supervisor, James Scott Loquai, and all advice provided to clients is reviewed by the supervisor prior to implementation. James Crandell Long's contact information is on the cover page of this disclosure document.