

*This brochure supplement provides information about Ryan Paul Halliday that supplements the Crewe Capital Advisors LLC brochure. You should have received a copy of that brochure. Please contact Ryan Paul Halliday if you did not receive Crewe Capital Advisors LLC's brochure or if you have any questions about the contents of this supplement.*

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

## **Crewe Capital Advisors LLC**

### **Form ADV Part 2B – Individual Disclosure Brochure**

*for*

### **Ryan Paul Halliday**

Personal CRD Number: 4033864

Investment Adviser Representative

Crewe Capital Advisors LLC  
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## Item 2: Educational Background and Business Experience

**Name:** Ryan Paul Halliday **Born:** 1974

### **Educational Background and Professional Designations:**

#### **Education:**

MS of Finance Finance, Walsh College - 2001

BS of Business Administration Business & Finance, The College of Saint Rose - 1999

#### **Business Background:**

11/2014 - Present	CEO Crewe Capital Advisors LLC
05/2007 – 12/2014	Managing Member Wealth Navigation, LLC
05/2005 - 05/2007	Wealth Manager Contango Capital Advisors
06/1999 - 05/2005	Account Manager The AYCO Company, LP

## 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

Ryan Paul Halliday is a licensed insurance agent. From time to time, he will offer clients advice or products from those activities. Clients should be aware that these services pay a commission and involve a conflict of interest, as commissionable products conflict with the fiduciary duties of a registered investment adviser. Crewe Capital Advisors, LLC always acts in the best interest

of the client; including the sale of commissionable products to advisory clients. Clients are in no way required to utilize the services of any representative of Crewe Capital Advisors, LLC in such individual's outside capacities.

### **Item 5: Additional Compensation**

Ryan Paul Halliday does not receive any economic benefit from any person, company, or organization, other than Crewe Capital Advisors LLC in exchange for providing clients advisory services through Crewe Capital Advisors LLC.

### **Item 6: Supervision**

Ryan Paul Halliday is a co-owner and co-supervisor of Crewe Capital Advisors LLC, and works closely with co-supervisor Dustin C Thackeray. All advice provided to clients is reviewed by this co-supervisor prior to implementation. Dustin Thackeray can be reached at (801) 791-9388. Ryan Paul Halliday adheres to all required regulations regarding the activities of an Investment Adviser Representative and follows all policies and procedures outlined in the firm's policies and procedures manual, including the Code of Ethics, and appropriate securities regulatory requirements.

