



Crewe Capital Advisors LLC  
d/b/a Crewe Advisors

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

*for*

**Renn Olsen**

Personal CRD Number: 5181407 | Investment Adviser Representative

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

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

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# ITEM 2: Educational Background and Business Experience

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Name: Renn Olsen

Born: 1984

## Educational Background and Professional Designations:

### ***Education:***

Personal Financial Planning Certificate from UCLA Extension – December 2015  
Bachelors Finance, University of Utah – 2008

### ***Designations:***

CERTIFIED FINANCIAL PLANNER™ – March 2016

### ***Business Background:***

04/2015 – Present	Investment Adviser Representative Crewe Advisors
12/2008 – 02/2015	Associate Goldman Sachs & Co
03/2006 – 12/2008	Financial Analyst & Trader Ameriprise Financial

# ITEM 3: Disciplinary Information

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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

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Crewe Advisors acts in the best interest of the client and clients are not obligated to utilize the outside activities or services of any representative of Crewe Advisors. Clients should be aware that the following outside activities or services may involve a conflict of interest:

Renn Olsen is a licensed insurance agent. From time to time, he may offer clients advice or products from those activities. Clients should be aware that these services may pay a



commission and involve a conflict of interest as commissionable products conflict with the fiduciary duties of a registered investment adviser.

CA acts in the best interest of its clients in its advice, including but not limited to, outside business activities. Any recommendation to clients to participate in any of these outside business activities or services may be made if clients are qualified to invest in such investment vehicles based on their specific suitability requirements and for whom such an investment is appropriate based on attributes such as their knowledge, experience, risk tolerance, and other suitability factors.

## ITEM 5: Additional Compensation

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Renn Olsen does not receive any economic benefit from any person, company, or organization, other than Crewe Advisors in exchange for providing clients advisory services through Crewe Advisors.

## ITEM 6: Supervision

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As a representative of Crewe Advisors, Renn Olsen is supervised by Carmen Alderete, the firm's Chief Compliance Officer. Carmen Alderete is responsible for ensuring that Renn Olsen adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Carmen Alderete is (385) 355-2703.

