



# Crewe Capital Advisors LLC d/b/a Crewe Advisors

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## Form ADV Part 2B – Individual Disclosure Brochure

*for*

**Diana George**

Personal CRD Number: 4630141 | Investment Adviser Representative

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

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

136 E. South Temple, Suite 2400 | Salt Lake City, UT 84111  
385.355.2700 | [compliance@creweadvisors.com](mailto:compliance@creweadvisors.com) | [www.creweadvisors.com](http://www.creweadvisors.com)

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# ITEM 2: Educational Background and Business Experience

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**Name:** Diana George

**Born:** 1976

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

### **Education:**

MS of Taxation, Weber State University – 2016

MBA, Colorado State University – 2011

BS Accounting, University of Phoenix – 2006

### **Business Background:**

02/2016 - Present	Investment Adviser Representative Crewe Advisors
12/2012 - 08/2015	Vice President and Sr. Private Banker Wells Fargo Private Bank
12/2010 - 12/2012	Vice President and Women's Financial Group Manager Zions Bank
07/1998 - 12/2010	Relationship Manager Wells Fargo Bank, N.A.

# 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.

Diana George has the following outside business activities:

1. Owner of DSG Consulting LLC.



2. Advisory Council Member at Weber State University and Goddard Business School.
3. Board Member and Finance Committee Chair of Community Foundation of Utah.

From time to time, she may offer clients advice or products from those activities and clients should be aware that these services may involve a conflict of interest. Crewe Advisors always acts in the best interest of the client and clients are in no way required to utilize the services of any representative of Crewe Advisors in such individual's outside capacities.

## ITEM 5: Additional Compensation

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Diana George 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, Diana George is supervised by Carmen Alderete, the firm's Chief Compliance Officer. Carmen Alderete is responsible for ensuring that Diana George 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.

