



Crewe Capital Advisors LLC  
d/b/a Crewe Advisors

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## Form ADV Part 2B – Individual Disclosure Brochure

*for*

**Grant Rowan**

Personal CRD Number: 6703364 | Investment Adviser Representative

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

*Additional information about Grant Rowan 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: Grant Rowan

Born: 1979

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

#### ***Education:***

BA in History/Finance, Brigham Young University – 2003

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

09/2016 – Present	Investment Advisor Representative Crewe Advisors
07/2010 – Present	Insurance Agent Grant Rowan Financial
02/2013 – Present	Insurance Agent Porch Financial
05/2003 – 04/2007	Sales Representative Sporting Goods

## 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:

Grant Rowan 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.

Grant Rowan is co-founder of Porch Financial, a forms and processing software company for the life/annuity insurance industry. Grant is involved in the development and operations of the company and as such receives compensation for his services. Clients should be aware that this may involve a conflict of interest. Grant limits his participation to under 15% of his time.

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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Grant Rowan receives economic benefit from Porch Financial as its co-founder and partner.

## ITEM 6: Supervision

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As a representative of Crewe Advisors, Grant Rowan is supervised by Daniel Sudit, the firm's Chief Compliance officer. Daniel Sudit is responsible for ensuring that Grant Rowan 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 Daniel Sudit is (385) 355-2700.

