



Crewe Capital Advisors LLC  
d/b/a Crewe Advisors

---

## Form ADV Part 2B – Individual Disclosure Brochure

*for*

**Carmen Alderete**

Personal CRD Number: 6101404 | Investment Adviser Representative

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

*Additional information about Carmen Alderete 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)

VERSION DATE: 03.09.2017

## ITEM 2: Educational Background and Business Experience

---

Name: Carmen Alderete

Born: 1981

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

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

BS of Business Administration Business Administration, DeVry University – 2007

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

03/2017 - Present	Chief Compliance Officer Crewe Advisors
03/2015 – 03/2017	VP of Operations & Compliance Crewe Advisors
10/2009 – 01/2015	Chief Operating Officer Lefavi Wealth Management
02/2007 – 09/2009	Executive Assistant Phillips Edison Company

## 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

---

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:

Carmen Alderete is a licensed insurance agent. She does not offer clients advice or products for those activities.



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

---

Carmen Alderete receives no additional compensation outside of Crewe Advisors.

## ITEM 6: Supervision

---

Carmen Alderete is the Chief Compliance Officer and is supervised by Ryan Halliday, the firm's Managing Partner. Ryan Halliday is responsible for ensuring that Carmen Alderete 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 Ryan Halliday is (385) 355-2700.

