

# **Transcend Advisor Group, LLC**

## **Form ADV Part 2B – Brochure Supplement**

**for**

**Blair Allan Jamieson  
1127 Prairie Drive Suite 100  
Mount Pleasant, WI 53406**

**Effective: February 5, 2022**

This Form ADV2B (“Brochure Supplement”) provides information about the background and qualifications of Blair Allan Jamieson (CRD# 6056634) in addition to the information contained in the Transcend Advisor Group, LLC (the “Advisor”) (CRD # 311746) Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of the Transcend Advisor Group, LLC Disclosure Brochure or this Brochure Supplement, please contact us at (262) 884-9983.

Additional information about Mr. Jamieson is available on the SEC’s Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## **Item 2 – Educational Background and Business Experience**

Blair Allan Jamieson is an Investment Advisor Representative of Transcend Advisor Group. Mr. Jamieson, born in 1985, graduated in 2008 from The University of California at Riverside, with a Bachelor of Arts Degree and is dedicated to advising Clients of Transcend Advisor Group.

### **Licensing, designations and Examinations**

Series 66, 06/2013

Certified Financial Planner (CFP®)

The Certified Financial Planner™ (CFP®) designation is conferred by the Certified Financial Planner Board of Standards, Inc.. Candidates must have a bachelor's degree (or higher) from an accredited college or university, three years of full time personal financial planning experience and complete a course of study in financial planning topics. Candidates may be exempt from the course of study requirement if he or she holds one of the following: CPA, ChFC, CLU, Ph.d in business or economics, Doctor of Business Administration, or attorney's license. All candidates must successfully complete the CFP® Certification Examination. CFP's are subject to the CFP Board's ethical standards

### **Employment History:**

Registered Representative, The Leaders Group	06/2021 to Present
Investment Advisor Representative, Transcend Advisor Group, LLC	07/2021 to Present
Agent, Transcend Insurance Group	07/2021 to Present
Financial Representative, Principal Life Insurance Company	06/2016 to 07/2021
Financial Representative, Concierge Financial Partners	10/2020 to 07/2021
Registered Representative, Principal Securities Inc.	06/2016 to 07/2021
Private Banker, Union Bank Investment Services	06/2015 to 06/2016
Private Banker, MUFG Union Bank	05/2015 to 06/2016
Customer Service Manager, Bank West Investment Services	10/2012 to 05/2015
Customer Service Manager, Bank of the West	10/2012 to 05/2015

## **Item 3 – Disciplinary Information**

Mr. Jamieson does not have any legal or disciplinary events that are material to a client's or prospective client's evaluation of its advisory business or the integrity of its management. has. Mr. Jamieson's FINRA Brokercheck may have additional information regarding the disciplinary history of Blair Allan Jamieson that is not included in this brochure supplement (<http://brokercheck.finra.org>).

## **Item 4 – Other Business Activities**

Mr. Jamieson has the following Outside Business Activities. He is dual registered as a registered representative with The Leaders Group of Littleton, CO, where he devotes 10 hours a month selling investment products. He is an independent insurance through Transcend Insurance in which he sells insurance products including annuities. He spends approximately 10 hours a week during market and non-market hours on this endeavor.

## **Item 5 – Additional Compensation**

Mr. Jamieson is compensated for his additional business activities that are detailed in Item 4 above.

## **Item 6 – Supervision**

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As a supervised person, Mr. Jamieson's activities are supervised and monitored by Charles Eichner as Chief Compliance Officer (CCO). He can be reached at (262) 884-9983

Transcend Advisor Group has implemented a Code of Ethics and internal compliance that guide each employee in meeting their fiduciary obligations to Clients of Transcend Advisor Group. Further, Transcend Advisor Group is subject to regulatory oversight by various agencies. These agencies require registration by Transcend Advisor Group and its employees. As a registered entity, Transcend Advisor Group is subject to examinations by regulators, which may be announced or unannounced. Transcend Advisor Group is required to periodically update the information provided to these agencies and to provide various reports regarding the business activities and assets of the Advisor.

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#### **Item 7 – Requirements for State Registered Advisors**

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Mr. Jamieson does not have any additional information to disclose.