

Part 2B of Form ADV: *Brochure Supplement*

**Item 1 Cover Page**

Brad Phelan  
Crescent Advisor Group, Inc.  
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Plano, TX 75093  
972-490-0150

Part 2B of Form ADV - Brochure Supplement

December 22, 2023

**This brochure supplement provides information about Brad Phelan that supplements the Crescent Advisor Group, Inc. brochure. You should have received a copy of that brochure. Please contact Crescent Advisor Group, Inc. if you did not receive Crescent Advisory Group, Inc.'s brochure or if you have any questions about the contents of this supplement.**

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

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

Name:	Brad Phelan
Year of Birth:	1983
Formal Education:	Bachelor of Business Administration, 2005 Baylor University
	MBA, 2014 University of Arkansas

Business Background for preceding five (5) years:

07/2016-Present	Crescent Advisor Group, Inc. Investment Advisor Representative
7/2016-Present	GJ 627 Inc. President
08/2019-Present	UT Southwestern Director of Technology Commercialization Director, Blackstone Launchpad

## **Item 3 Disciplinary Information**

No information to report

## **Item 4 Other Business Activities**

Bradley Phelan is President of GJ 627, Inc., a company providing consulting services to small businesses. This activity is not investment related, and represents less than 10% of Mr. Phelan's revenue and takes up less than 10% of his time.

Bradley Phelan is employed full-time by UT Southwestern as Director of Technology Commercialization and Director, Blackston Launchpad. This activity is not investent related, and involves a substantial amount of Mr. Phelan's time and represents the majority of his revenue.

## **Item 5 Additional Compensation**

Nothing to report

## **Item 6 Supervision**

Investment Advisor Representatives are supervised on an ongoing basis. All advisory accounts are monitored on a systematic random basis, are reviewed by the investment advisor representative, and reviewed no less than quarterly by a designated principal of the firm. More active accounts and larger accounts may be reviewed on a more frequent basis.

Supervision of investment advisor representatives consists of reviews of advisory accounts on a transactional basis to insure that each transaction is (1) suitable to the respective client's investment objectives; (2) meets that client's quality standards; and (3) to make certain the activity is consistent with their financial profile.

All communications with advisory clients are also monitored and reviewed on an on-going basis to ensure the investment advice being given is appropriate for each advisory client.

### **Person Responsible for Supervision of Investment Advisor Representative**

Nick Duren  
President  
(972) 490-0150