

Part 2B of Form ADV: *Brochure Supplement*

Item 1 Cover Page

Tyler Castle, CFP®  
Crescent Advisor Group, Inc.  
d/b/a Lowell Wealth Management  
d/b/a Castle Financial LLC  
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Lubbock, TX 79424

Part 2B of Form ADV - Brochure Supplement

December 22, 2023

**This brochure supplement provides information about Tyler Castle 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 Tyler Castle is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) and on the CFP® Board's website at <https://www.cfp.net>.**

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

Born 1988

Texas Tech University 2015 Bachelor of Science

Personal Financial Planning Crescent Advisor Group 2019 to present

Registered Representative Crescent Securities Group, Inc. 2019 to present

Personal Financial Planning Lowell and Company Inc. 2016 to 2019

Registered Representative Lowell and Company Inc. 2016 to 2019

Registered Representative, General Securities Representative, Insurance Representative.

CERTIFIED FINANCIAL PLANNER™ practitioner.

## **Item 3 Disciplinary Information**

No information to report.

## **Item 4 Other Business Activities**

Mr. Castle is a registered representative of Crescent Securities Group, Inc. and is an insurance producer.

## **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 consist 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