This brochure supplement provides information about Brett Maggard that supplements the Singer Wealth Advisors, LLC brochure. You should have received a copy of that brochure. Please contact Brett Maggard if you did not receive Singer Wealth Advisors LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Brett Maggard is also available on the SEC's website at www.adviserinfo.sec.gov.

# Singer Wealth Advisors LLC.

Form ADV Part 2B - Individual Disclosure Brochure

for

### **Brett Maggard**

Personal CRD Number: 6971971 Investment Adviser Representative

> Singer Wealth Advisors, LLC 2210 Ashley Oaks Circle, Suite #102 Wesley Chapel, Florida 33544 Brett@maggardwealth.com (561) 998-9985

Singer Wealth Advisors, LLC 1515 S. Federal Hwy, Suite #211, Boca Raton, FL 33432 (561) 998-9985

Updated: 09/06/2023

# Item 2: Educational Background and Business Experience

Name: Brett Maggard Born: 1992

### **Education & Business Background:**

Masters Sports Administration, Angelo State University - San Angelo, Texas - 2017 Bachelors Business Administration, Florida Atlantic University - 2015

#### **Business Background:**

12/2022 - Present Investment Advisor Representative

Singer Wealth Advisors, LLC

08/2018 - Present Insurance Agent

Maggard Wealth Management

01/2022 - 12/2022 Investment Advisor Representative

**Brokers International Financial Services** 

10/2020 - 10/2021 Investment Advisor Representative

Prime Capital Investment Advisors, LLC

06/2018 - 10/2020 Registered Representative

Bankers Life Securities

08/2016 - 10/2020 Insurance Agent

Bankers Life & Casualty

# **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**

Brett Maggard is a licensed insurance agent. From time to time, he will offer clients advice or products from those activities. Clients should be aware that these services pay a commission and involve a conflict of interest, as commissionable products conflict with the fiduciary duties of a registered investment adviser. Singer Wealth Advisors always acts in the best interest of the client, including the sale of commissionable products to advisory clients. Clients always have the right to decide whether or not to utilize the services of any representative of Singer Wealth Advisors in such individuals outside capacities.

Brett Maggard is the founder and owner of Maggard Wealth Management, an S Corporation. Through that firm, he sells fixed indexed annuities, life insurance, and long-term care insurance.

# **Item 5: Additional Compensation**

Brett Maggard does not receive any economic benefit from any person, company, or organization, other than Singer Wealth Advisors, LLC. in exchange for providing clients advisory services through Singer Wealth Advisors, LLC.

### **Item 6: Supervision**

As a representative of Singer Wealth Advisors, LLC., Brett Maggard is supervised by Keith Singer, the firm's Chief Executive Officer. Keith Singer is responsible for ensuring that Brett Maggard 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 Keith Singer is (561) 998-9985