

*This brochure supplement provides information about Charles Landry that supplements the Singer Wealth Advisors, LLC brochure. You should have received a copy of that brochure. Please contact Charles Landry 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 Charles Landry is also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).*

## **Singer Wealth Advisors LLC.**

**Form ADV Part 2B – Individual Disclosure Brochure**

*for*

### **Charles Landry**

Personal CRD Number: 7605085

Investment Adviser Representative

Singer Wealth Advisors, LLC  
3 Harvard Circle,  
West Palm Beach, FL 33324  
Charles@singerwealth.com  
(561) 998-9985

Singer Wealth Advisors, LLC  
1515 S. Federal Highway, Suite 302  
Boca Raton, FL 33432  
(561) 998-9985

UPDATED: 02/06/2024

## Item 2: Educational Background and Business Experience

**Name:** Charles Landry

**Born:** 2000

### Education & Business Background:

#### Education:

Florida Atlantic University, Associate of Arts - 2019

Florida State University, Bachelor of Science - 2022

#### Business Background:

01/2024 - Present

Manager  
CLFinancial, LLC

07/2022 - Present

Investment Advisor Representative  
Singer Wealth Advisors, LLC

05/2021 - 07/2022

Intern  
Singer Wealth Advisors, LLC

## 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

Charles Landry 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 individual's outside capacities.

Charles Landry is the manager and owner of CLFinancial, LLC.

### **Item 5: Additional Compensation**

Charles Landry 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., Charles Landry is supervised by Keith Singer, the firm's Chief Executive Officer. Keith Singer is responsible for ensuring that Charles Landry 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.