

This brochure supplement provides information about Daniel J Montano that supplements the Singer Wealth Advisors, LLC brochure. You should have received a copy of that brochure. Please contact Daniel J Montano 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 Daniel J Montano 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

Daniel J Montano

Personal CRD Number: 6728420

Investment Adviser Representative

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

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Boca Raton, FL 33432
(561) 998-9985

UPDATED: 04/15/2024

Item 2: Educational Background and Business Experience

Name: Daniel J Montano

Born: 1994

Education & Business Background:

Education Background:

Bachelors Ministerial Leadership, Southeastern University -2015

Business Background:

03/2024 – Present	Investment Advisor Representative Singer Wealth Advisors, LLC
03/2024 – Present	Insurance Agent Maggard Wealth Management
09/2023 - 03/2024	Investment Advisor Representative Principal Financial Group
03/2017 - 08/2023	Financial Advisor Bankers Life Services
11/2016 - 08/2023	Registered Representative Bankers Life Securities Inc
08/2013 – 08/2023	Agent/Unit Field Trainer 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

Daniel J Montano 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.

Item 5: Additional Compensation

Daniel J Montano 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., Daniel J Montano is supervised by Keith Singer, the firm's Chief Executive Officer. Keith Singer is responsible for ensuring that Daniel J Montano 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