

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

### **KURT STEIN**

Personal CRD Number: 3159180

Investment Adviser Representative

Singer Wealth Advisors, LLC  
1515 S. Federal Highway  
Suite 302  
Boca Raton, FL 33432

(561) 998-9985  
[kurt.stein@singerwealth.com](mailto:kurt.stein@singerwealth.com)

Updated: 11/25/2024

## Item 2: Educational Background and Business Experience

**Name:** KURT STEIN

**Born:** 1967

### Education & Business Background:

#### Education:

University of Florida, Finance - 1985

#### Business Background:

11/2024 – Present	Investment Advisor Representative Singer Wealth Advisors, LLC
12/2023 – Present	Consultant Self- Employed
04/2019 – 11/2023	Registered Rep Quint Capital- DBA Skymount Capital
03/2019 – 04/2019	Registered Rep Palladium Capital Advisors, LLC
03/2018 – 03/2019	Investment Advisor Representative National Asset Management
03/2018 – 03/2019	Registered Rep National Securities Corp

## Item 3: Disciplinary Information

Kurt has two legal events that are material to a client's or prospective client's evaluation of this advisory business.

Event one involved a client loss and unsuitable investments while employed with Merrill Lynch, Merrill settled with the client in November 2019. Kurt was the advisor for the client but was not named in the settlement.

Event two involved a client who claimed there was misrepresentation regarding and investment, again while employed with Merrill Lynch. Merrill settled with the client in August 2022. Kurt was the advisor for the client but was not named in the settlement.

#### **Item 4: Other Business Activities**

Kurt does outside consulting as a managing member of Skymount LLC, which consists of various Fundraising, Job Placement and Administrative services to religious organizations. I will be compensated for each of these engagements, which will be determined on a case-by-case basis. This is not investment related.

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

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