# Item 1: Cover Page Part 2B of Form ADV: Brochure Supplement March 2023

## **Mark Tracy**

Enduring Wealth Advisors, LLC 27555 Ynez Road, Suite 212 Temecula, California 92591 <a href="https://enduringwealth.com/">https://enduringwealth.com/</a>

Firm Contact: Mark Tracy Chief Compliance Officer

This brochure supplement provides information about Mr. Tracy that supplements our brochure. You should have received a copy of that brochure. Please contact Mark Tracy if you did not receive Enduring Wealth Advisors, LLC's brochure or if you have any questions about the contents of this supplement. Additional information about Mr. Tracy is available on the SEC's website at <a href="https://www.adviserinfo.sec.gov">www.adviserinfo.sec.gov</a> by searching CRD #6021317.

## Item 2: Educational Background & Business Experience

Mark Ronald Tracy Year of Birth: 1980

#### **Educational Background:**

- 2012: California State University, Fullerton; Master of Business Administration Finance
- 2010: California State University, Fullerton; Bachelor of Arts Business Administration Finance
- 2007: Orange Coast College; Associate of Arts TV Production, Computer Programming/ Business
- 2001: Computer Learning Centers; Computer Programming

#### **Business Background:**

•	03/2023 - Present	Enduring Wealth Advisors, LLC; President and Chief Compliance
		Officer
•	03/2013 - Present	LPL Financial; Registered Representative
•	03/2013 - 03/2023	LPL Financial dba Enduring Wealth Advisors; Investment Advisor
		Representative

#### **Exams, Licenses & Other Professional Designations:**

- 10/2018: SIE Securities Industry Essentials Examination
- 02/2014: California Insurance License
- 03/2013: Series 66 & Series 7 Exams

#### **Item 3: Disciplinary Information**

There are no legal or disciplinary events material to the evaluation of Mr. Tracy.

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

Mr. Tracy is a registered representative of LPL Financial, member FINRA/SIPC, and licensed insurance agent/broker. He may offer products and receive normal and customary commissions as a result of these transactions. A conflict of interest may arise as these commissionable securities sales may create an incentive to recommend products based on the compensation earned. To mitigate this potential conflict, Mr. Tracy, as a fiduciary, will act in the client's best interest. He will not, however, be offering insurance products nor will he receive customary fees as a result of insurance sales.

## **Item 5: Additional Compensation**

Mr. Tracy does not receive any other economic benefit for providing advisory services in addition to advisory fees.

## **Item 6: Supervision**

Ralph Bender is a principal of Enduring Wealth Advisors, LLC and as such supervises and monitors Mr. Tracy's activities on a regular basis to ensure compliance with our firm's Code of Ethics. Please contact Ralph Bender if you have any questions about Mr. Tracy's brochure supplement at (951)-693-9900.