

**Item 1: Cover Page  
Part 2B of Form ADV: Brochure Supplement  
March 2024**



**Mark Tracy**

**2755 Ynez Road, Suite 212  
Temecula, California 92591  
<https://enduringwealth.com/>**

**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 [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) 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:**

- 04/2023: CERTIFIED FINANCIAL PLANNER™, CFP®
- 10/2018: SIE – Securities Industry Essentials Examination
- 02/2014: California Insurance License
- 03/2013: Series 66 & Series 7 Exams

### **CERTIFIED FINANCIAL PLANNER™, CFP®**

The CFP® certification is obtained by completing an advanced college-level course of study addressing the financial planning subject areas that the CFP® Board's studies have determined as necessary for the competent and professional delivery of financial planning services, a comprehensive certification exam and agreeing to be bound by the CFP® board's *Standard of Professional Conduct*. As a prerequisite, the individual must have a Bachelor's degree from a regionally accredited United States college or university (or foreign university equivalent) and have at least 3 years of full-time financial planning experience (or equivalent measured at 2,000 hours per year). This designation requires 30 hours of continuing education every 2 years and renewing an agreement to be bound by the *Standards of Professional Conduct*.

## 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.