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



# **Mona Hurtado**

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 Ms. Hurtado 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 Ms. Hurtado is available on the SEC's website at <a href="https://www.adviserinfo.sec.gov">www.adviserinfo.sec.gov</a> by searching CRD #7057747.

### **Item 2: Educational Background & Business Experience**

Mona Hurtado Year of Birth: 1963

#### **Educational Background:**

• 2009: University of Phoenix; Associate of Arts & Accountancy

#### **Business Background:**

• 03/2023 - Present Enduring Wealth Advisors, LLC; Client Relationship Manager

09/2021 - Present LPL Financial; Registered Sales Assistant
 01/2019 - 09/2021 LPL Financial; Administrative Assistant

• 06/2016 - 12/2018 Pala Casino; Cage Cashier III

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

• 08/2022: CA Insurance License

01/2022: Series 6609/2021: Series 7

• 07/2019: SIE – Securities Industry Essentials Exam

# **Item 3: Disciplinary Information**

There are no legal or disciplinary events material to the evaluation of Ms. Hurtado.

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

Ms. Hurtado is a registered representative of LPL Financial, member FINRA/SIPC, and licensed insurance agent/broker. She 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, Ms. Hurtado, as a fiduciary, will act in the client's best interest. She will not be offering insurance products, nor will he receive customary fees as a result of insurance sales.

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

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

# **Item 6: Supervision**

Mark Tracy, President and Chief Compliance Officer of Enduring Wealth Advisors, LLC, supervises and monitors Ms. Hurtado's activities on a regular basis to ensure compliance with our firm's Code of Ethics. Please contact Mark Tracy if you have any questions about Ms. Hurtado's brochure supplement at (951) 693-9900.