

This brochure supplement provides information about Steven Eric Trachtenberg that supplements the Singer Wealth Management brochure. You should have received a copy of that brochure. Please contact Steven Eric Trachtenberg if you did not receive Singer Wealth Management's brochure or if you have any questions about the contents of this supplement.

Additional information about Steven Eric Trachtenberg is also available on the SEC's website at www.adviserinfo.sec.gov.

Singer Wealth Management

Form ADV Part 2B – Individual Disclosure Brochure

for

Steven Eric Trachtenberg

Personal CRD Number: 6995521

Investment Adviser Representative

Singer Wealth Management
1515 S Federal Highway 211
Boca Raton, FL 33432
(561) 998-9985
steven@singerwealth.com

UPDATED: 05/06/2020

Item 2: Educational Background and Business Experience

Name: Steven Eric Trachtenberg **Born:** 1967

Education & Business Background:

Steve is committed to educating, involving and motivating clients to help them take control of their financial futures.

Steven attended the University of Maine, where he studied both business finance and business administration. His career in the financial industry began at PaineWebber and Company, a NYSE listed brokerage firm. He has always enjoyed providing advice and financial solution suggestions to clients who are approaching or are in retirement.

Steven has lived in Boca Raton, Florida since 1998. When not working, Steve spends time with his wife, Melissa, and their three children Ava, Mina and Dylan. He enjoys golf, traveling, tennis, reading, cooking, and theatre and is an active member of his temple in Boca Raton.

09-2016 - Present President/Owner
SET Wealth Inc.

09/2018 - Present Investment Adviser Representative
Singer Wealth Management

Item 3: Disciplinary Information

Steven Eric Trachtenberg pled "No Contest" to trespassing. He was charged with possession of a controlled substance which was later dismissed. Steven Eric Trachtenberg attended drug court 2007- 2008.

Item 4: Other Business Activities

Steven Eric Trachtenberg is a licensed insurance agent. From time to time, he will offer clients advice or products from this activity. Clients should be aware that these services pay a commission and involve a possible conflict of interest, as commissionable products can conflict with the fiduciary duties of a registered investment adviser. Singer Wealth Management always acts in the best interest of the client; including in the sale of commissionable products to advisory

clients. Clients are in no way required to implement the plan through any representative of Singer Wealth Management in their capacity as a licensed insurance agent.

Item 5: Additional Compensation

Steven Eric Trachtenberg does not receive any economic benefit from any person, company, or organization, other than Singer Wealth Management in exchange for providing clients advisory services through Singer Wealth Management.

Item 6: Supervision

As a representative of Singer Wealth Management, Steven Eric Trachtenberg is supervised by Keith E Singer, the firm's Chief Compliance Officer. Keith E Singer is responsible for ensuring that Steven Eric Trachtenberg 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 E Singer is (561) 998-9985.

Item 7: Requirements For State Registered Advisers

This disclosure is required by state securities authorities and is provided for your use in evaluating this investment advisor representative's suitability.

A. Steven Eric Trachtenberg has NOT been involved in any of the events listed below.

1. An award or otherwise being found liable in an arbitration claim alleging damages in excess of \$2,500, involving any of the following:
 - a) an investment or an investment-related business or activity;
 - b) fraud, false statement(s), or omissions;
 - c) theft, embezzlement, or other wrongful taking of property;
 - d) bribery, forgery, counterfeiting, or extortion; or
 - e) dishonest, unfair, or unethical practices.

2. An award or otherwise being found liable in a civil, self-regulatory organization, or administrative proceeding involving any of the following:
 - a) an investment or an investment-related business or activity;
 - b) fraud, false statement(s), or omissions;
 - c) theft, embezzlement, or other wrongful taking of property;
 - d) bribery, forgery, counterfeiting, or extortion; or
 - e) dishonest, unfair, or unethical practices.

B. Steven Eric Trachtenberg has NOT been the subject of a bankruptcy.