

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

**Steven Eric Trachtenberg**

Personal CRD Number 6995532

Investment Advisor Representative

Singer Wealth Advisors, LLC  
1515 S. Federal Highway, Suite 211  
Boca Raton, FL 33432  
(561) 998-9985

[steven@singerwealth.com](mailto:steven@singerwealth.com)

UPDATED: 7/9/2021

## Item 2: Educational Background and Business Experience

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

### Education & Business Background:

#### Education:

Steven Eric Trachtenberg studied Business Administration and Business Finance at the University of Maine from 1985 through 1989.

#### Business Background:

|                   |                                                                  |
|-------------------|------------------------------------------------------------------|
| 09/2018 - Present | Investment Adviser Representative<br>Singer Wealth Advisors      |
| 09/2016 - Present | SET Wealth LLC<br>President/Owner                                |
| 09/2016 - 09/2018 | SET Wealth LLC<br>President/Owner<br>Annuity and Insurance sales |

## Item 3: Disciplinary Information

Steven Trachtenberg plead No Contest to trespassing and no plea for possession of controlled substance, attended drug court and charges were dismissed in 2008.

## Item 4: Other Business Activities

Steven Trachtenberg is a licensed insurance agent. From time to time, he will offer clients advice or products from those activities. Clients should be aware that these services pay a commission and involve a conflict of interest, as commissionable products conflict with the fiduciary duties of a registered investment adviser. Singer Wealth Advisors always acts in the best interest of the client; including the sale of commissionable products to advisory clients. Clients always have the right to decide whether or not to utilize the services of any representative of Singer Wealth Advisors in such individual's outside capacities.

Steven is the president and owner of SET Wealth LLC, and also the owner of rental properties.

Steven has 10% ownership in Singer Wealth Advisors LLC.

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

Steven Eric Trachtenberg 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., Steven Eric Trachtenberg is supervised by Keith Singer, the firm's Chief Executive Officer. Keith 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 Singer is (561) 998-9985