

Financial & Tax Architects, LLC

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Form ADV Part 2B

Daniel Upchurch

July 11, 2023

This brochure supplement provides information about Daniel Upchurch that supplements Financial & Tax Architects, LLC's brochure. You should have received a copy of that brochure. Please contact Tito Pombra, Chief Compliance Officer, if you did not receive Financial & Tax Architects, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Daniel Upchurch (CRD #7775711) is available on the SEC's website at www.adviserinfo.sec.gov.

Brochure Supplement – Form ADV Part 2B

Daniel Upchurch

Investment Advisor Representative

Year of Birth: 1971

Item 2 Educational Background and Business Experience

Educational Background:

- Webster University; Attended
- North Carolina State University; Attended

Business Experience:

- Financial & Tax Architects, LLC; Investment Advisor Representative; 06/2023 – Present
- Yates Group, Insurance Agent, 09/2012 – Present

Item 3 Disciplinary Information

- Criminal or Civil Action: None to report.
- Administrative Proceeding: None to report.
- Self-Regulatory Proceeding: None to report.

Item 4 Other Business Activities

Daniel Upchurch is a licensed insurance agent. Accordingly, he may recommend insurance products and receive customary commissions. This practice creates a conflict of interest as Daniel Upchurch has a financial incentive to recommend insurance products based on the compensation he receives. To mitigate this conflict, Daniel Upchurch will only recommend insurance products when he believes they are in the client's best interest. Clients have no obligation to purchase insurance products through Daniel Upchurch.

Item 5 Additional Compensation

Daniel Upchurch does not receive additional compensation from his advisory activities. He does receive additional compensation from the outside business activities described above.

Daniel Upchurch is not paid performance-based fees.

Item 6 Supervision

Tito Pombra is FTA's Chief Compliance Officer. Tito Pombra and FTA's senior management supervise the advisory activities of Daniel Upchurch. Tito Pombra can be reached by phone at 650-703-2159 or by email at tpombra@outsourcenco.com.