

Financial & Tax Architects, LLC

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Form ADV Part 2B

Scott Peterson

March 8, 2024

This brochure supplement provides information about Scott Peterson 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 Scott Peterson (CRD #5999160) is available on the SEC's website at www.adviserinfo.sec.gov.

Brochure Supplement – Form ADV Part 2B

Scott Peterson

Investment Advisor Representative

Year of Birth: 1982

Item 2 Educational Background and Business Experience

Educational Background:

- University of Missouri - St. Louis; Bachelors – Business Administration; 2007

Business Experience:

- Financial and Tax Architects, LLC; Investment Advisor Representative; 06/2019 – Present
- Edward Jones & Co.; Registered Representative; 11/2014 – 05/2019
- Edward Jones & Co.; Recruiter; 11/2011 – 10/2014
- Aerotek; Recruiter; 12/2007 – 11/2011

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

Scott Peterson is also licensed insurance agent. Less than 50% of Mr. Peterson's time is spent in his role as an insurance agent for FTA Insurance Services, LLC. Mr. Peterson only offers insurance products in states where is licensed.

This practice represents a conflict of interest. There is a financial incentive for Mr. Peterson to recommend products that pay him a commission or other compensation. The conflict mitigation steps include disclosures, the Code of Ethics, and Mr. Peterson's fiduciary obligation to place the best interest of the client first. There is no obligation to purchase any commission based or other compensated products. Clients have the option to purchase any recommended products through the insurance agent of their choosing.

Item 5 Additional Compensation

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

Mr. Peterson 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 Mr. Peterson. Tito Pombra can be reached by phone at 650-703-2159 or by email at tpombra@outsourccecco.com.