

Financial & Tax Architects, LLC

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FormADV Part 2B

Cassandra Sanchez

Cassandra Sanchez's Office Location

6860 N Dallas Pkwy, Suite 200

Plano, TX 75024

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This brochure supplement provides information about Cassandra Sanchez that supplements Financial & Tax Architects, LLC's brochure. You should have received a copy of that brochure. Please contact Paul Felsch, 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 Cassandra Sanchez CRD #6914610 is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Brochure Supplement – Form ADV Part 2B

### **Cassandra Sanchez**

Investment Adviser Representative

Year of Birth: 01/06/1994

### **Item 2 Educational Background and Business Experience**

#### **Educational Background:**

- The University of North Texas; 08/2013–07/2017; Bachelor of Science
- Collin County Community College System; 01/2013–05/2013 (no degree obtained)
- Dallas County Community College System; 08/2012–12/2012 (no degree obtained)

#### **Professional Licenses & Certifications:**

- Series 65

#### **Business Experienced:**

- Financial and Tax Architects, LLC; Financial Advisor; 12/2025–Present
- Fisher Investments; Investment Counselor; 08/2022–12/2025
- TIAA; Registered representative/Financial Services Consultant; 04/2021–06/2022
- US Health Advisors; Agent; 09/2020–02/2021
- TIAA-CREF Individual & Institutional Services, LLC; Registered Representative; 03/2018–10/2020
- TIAA; Sr Customer Advocate; 03/2018–10/2020

### **Item 3 Disciplinary Information**

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

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

Cassandra Sanchez is a licensed insurance agent. Ms. Sanchez only offers insurance products in states where she is licensed. This practice represents a conflict of interest. There is a financial incentive for Ms. Sanchez to recommend products that pay her commission or other compensation. The conflict mitigation steps include disclosures, the Code of Ethics, and Ms. Sanchez'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.

AdvisorMax, LLC: AdvisorMax, LLC is an affiliate of FTA which sells insurance and annuity products to FTA clients. AdvisorMax, LLC, is an insurance and annuity field marketing organization ("FMO"). An FMO is a platform that brings insurance companies and insurance

agents together. AdvisorMax recruits insurance agents to its wholesale platform of insurance products and product support. The platform allows agents to access the product offerings of insurance product underwriters. When a supported agent sells a product, the insurance or annuity company pays a sales commission directly to AdvisorMax. The selling agent also is paid a commission based on the value of the product. The insurance company pays AdvisorMax the commission. In some instances, FTA's investment advisory representatives may sell insurance products using AdvisorMax as the FMO. Sales commissions paid to FTA advisory representatives are separate from FTA's advisory fees.

#### Item 5 Additional Compensation

Ms. Sanchez does not receive any additional compensation resulting from her advisory activities. She does receive additional compensation from the outside business activities described above.

Ms. Sanchez does not receive performance-based fees.

#### Item 6 Supervision

Gordon Haave and FTA's senior management supervise the advisory activities of Ms. Sanchez. Gordon Haave can be reached by phone at 314-377-5565 or by email at ghaave@fta-ria.com.