

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

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

Polaris Wealth Management, LLC
Form ADV Part 2B – Individual Disclosure Brochure

for

Eric Dale Grant
Personal CRD Number: 1960689
Investment Adviser Representative

Polaris Wealth Management, LLC
19150 S. Kedzie, Suite 204
Flossmoor, IL 60422
(312) 951-2606
egrant@polarisadvice.com

UPDATED: 05/08/2020

Item 2: Educational Background and Business Experience

Name: Eric Dale Grant **Born:** 1966

Educational Background and Professional Designations:

Education:

BBA Finance/Insurance, Howard University - 1989

Business Background:

| | |
|-------------------|--|
| 03/2020 - Present | Managing Member & Chief Compliance Officer Polaris Wealth Management, LLC |
| 07/2018 - Present | Investment Adviser Representative Csenge Advisory Group, LLC |
| 07/2018 - Present | Investment Adviser Representative Lions Street Financial, LLC |
| 07/2018 - Present | Registered Representative Lions Street Financial, LLC |

Item 3: Disciplinary Information

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

Item 4: Other Business Activities

Eric Dale Grant is a registered representative with Lions Street Financial, LLC. From time to time, he will offer clients advice or products from this activity. Clients should be aware that these services pay a commission or other compensation and involve a conflict of interest, as commissionable products conflict with the fiduciary duties of a registered investment adviser. PWM always acts in the best interest of the client, including with respect to the sale of commissionable products to advisory clients. Clients are in no way required to implement the

plan through any representative of PWM in such individual's capacity as a registered representative.

Eric D Grant is a licensed insurance agent with Polaris Insurance Agency, and from time to time, will offer clients advice or products from those activities. Clients should be aware that these services pay a commission or other compensation and involve a conflict of interest, as commissionable products conflict with the fiduciary duties of a registered investment adviser. PWM always acts in the best interest of the client; including the sale of commissionable products to advisory clients. Clients are in no way required to utilize the services of any representative of PWM in connection with such individual's activities outside of PWM.

Eric D Grant is an investment adviser representative with another investment advisory firm, Csege Advisory Group, and from time to time, may offer clients advice or products from those activities and clients should be aware that these services may involve a conflict of interest. PWM always acts in the best interest of the client and clients are in no way required to use the services of any representative of PWM in connection with such individual's activities outside of PWM.

Eric D Grant is an investment adviser representative with another investment advisory firm, Lions Street Financial, LLC, and from time to time, may offer clients advice or products from those activities and clients should be aware that these services may involve a conflict of interest. PWM always acts in the best interest of the client and clients are in no way required to use the services of any representative of PWM in connection with such individual's activities outside of PWM.

Item 5: Additional Compensation

Eric Dale Grant does not receive any economic benefit from any person, company, or organization, other than Polaris Wealth Management, LLC in exchange for providing clients advisory services through Polaris Wealth Management, LLC.

Item 6: Supervision

As the Chief Compliance Officer of Polaris Wealth Management, LLC, Eric Dale Grant supervises all activities of the firm. Eric Dale Grant's contact information is on the cover page of this disclosure document. Eric Dale Grant adheres to applicable regulatory requirements, together with all policies and procedures outlined in the firm's code of ethics and compliance manual.

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. Eric Dale Grant 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. Eric Dale Grant has NOT been the subject of a bankruptcy.