



IAPD Report

STANLEY BERNARD STARR JR

CRD# 1391920

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When communicating online or investing with any professional, make sure you know who you're dealing with. [Imposters](#) might link to sites like BrokerCheck from [phishing](#) or similar scam websites, or through [social media](#), trying to steal your personal information or your money.

Please contact FINRA with any concerns.



IAPD Information About Representatives

IAPD offers information on all current-and many former representatives. Investors are strongly encouraged to use IAPD to check the background of representatives before deciding to conduct, or continue to conduct, business with them.

What is included in a IAPD report?

IAPD reports for individual representatives include information such as employment history, professional qualifications, disciplinary actions, criminal convictions, civil judgments and arbitration awards.

It is important to note that the information contained in an IAPD report may include pending actions or allegations that may be contested, unresolved or unproven. In the end, these actions or allegations may be resolved in favor of the representative, or concluded through a negotiated settlement with no admission or finding of wrongdoing.

Where did this information come from?

The information contained in IAPD comes from the Investment Adviser Registration Depository (IARD) and FINRA's Central Registration Depository, or CRD, (see more on CRD below) and is a combination of:

- information the states require representatives and firms to submit as part of the registration and licensing process, and
- information that state regulators report regarding disciplinary actions or allegations against representatives.

How current is this information?

Generally, representatives are required to update their professional and disciplinary information in IARD within 30 days.

Need help interpreting this report?

For help understanding how to read this report, please consult NASAA's IAPD Tips page <http://www.nasaa.org/IAPD/IARReports.cfm>

What if I want to check the background of an Individual Broker or Brokerage Firm?

To check the background of an Individual Broker or Brokerage firm, you can search for the firm or individual in IAPD. If your search is successful, click on the link provided to view the available licensing and registration information in FINRA's BrokerCheck website.

Are there other resources I can use to check the background of investment professionals?

It is recommended that you learn as much as possible about an individual representative or Investment Adviser firm before deciding to work with them. Your state securities regulator can help you research individuals and certain firms doing business in your state. The contact information for state securities regulators can be found on the website of the North American Securities Administrators Association <http://www.nasaa.org>



Report Summary

STANLEY BERNARD STARR JR (CRD# 1391920)

The report summary provides an overview of the representative's professional background and conduct. The information contained in this report has been provided by the representative, investment adviser and/or securities firms, and/or securities regulators as part of the states' investment adviser registration and licensing process. The information contained in this report was last updated by the representative, a previous employing firm, or a securities regulator on **04/14/2026**.

CURRENT EMPLOYERS

	Firm	CRD#	Registered Since
B	VANDERBILT SECURITIES, LLC	CRD# 5953	11/17/2025
IA	CONSOLIDATED PORTFOLIO REVIEW CORP	CRD# 112694	11/26/2025

QUALIFICATIONS

This representative is currently registered in **1** SRO(s) and 1 jurisdiction(s).

Is this representative currently Inactive or Suspended with any regulator? **No**

Note: Not all jurisdictions require IAR registration or may have an exemption from registration.

Additional information including this individual's qualification examinations and professional designations is available in the Detailed Report.

REGISTRATION HISTORY

This representative was previously registered with the following firm(s):

	FIRM	CRD#	LOCATION	REGISTRATION DATES
B	STONEX SECURITIES INC.	18456	Lancaster, MA	10/08/2024 - 11/19/2025
IA	TRUST ADVISORY GROUP LTD	106926	LANCASTER, MA	01/01/1996 - 11/19/2025
B	AGES FINANCIAL SERVICES, LTD.	15427	LANCASTER, MA	05/02/1995 - 09/24/2024

For additional registration and employment history details as reported by the individual, refer to the Registration and Employment History section of the Detailed Report.

DISCLOSURE INFORMATION

Disclosure events include certain criminal charges and convictions, formal investigations and disciplinary actions initiated by regulators, customer disputes and arbitrations, and financial disclosures such as bankruptcies and unpaid judgments or liens.

Are there events disclosed about this representative? **Yes**

The following types of events are disclosed about this representative:

Type	Count
Customer Dispute	1
Termination	1



Qualifications

REGISTRATIONS

This section provides the SRO, states and U.S. territories in which the representative is currently registered and licensed, the category of each registration, and the date on which the registration becomes effective. This section also provides, for each firm with which the representative is currently employed, the address of each location where the representative works. This individual is currently registered with **1** jurisdiction(s) and **1** SRO(s) through his or her employer(s).

Employment 1 of 2

Firm Name: **CONSOLIDATED PORTFOLIO REVIEW CORP**
Main Address: 125 FROEHLICH FARM BLVD.
WOODBURY, NY 11797
Firm ID#: 112694

	Regulator	Registration	Status	Date
IA	Massachusetts	Investment Adviser Representative	Approved	11/26/2025

Branch Office Locations

CONSOLIDATED PORTFOLIO REVIEW CORP
Lancaster, MA

Employment 2 of 2

Firm Name: **VANDERBILT SECURITIES, LLC**
Main Address: 125 FROEHLICH FARM BLVD.
WOODBURY, NY 11797
Firm ID#: 5953

	Regulator	Registration	Status	Date
B	FINRA	General Securities Principal	Approved	11/17/2025
B	FINRA	General Securities Representative	Approved	11/17/2025
B	Massachusetts	Agent	Approved	11/17/2025

Branch Office Locations

Lancaster, MA



Qualifications

PASSED INDUSTRY EXAMS

This section includes all industry exams that the representative has passed. Under limited circumstances, a representative may attain registration after receiving an exam waiver based on a combination of exams the representative has passed and qualifying work experience. Likewise a new exam requirement may be grandfathered based on a representative's specific qualifying work experience. Exam waivers and grandfathering are not included below.

This individual has passed 1 principal/supervisory exam, 2 general industry/product exams, and 2 state securities law exams.

Principal/Supervisory Exams

	Exam	Category	Date
	General Securities Principal Examination (S24)	Series 24	08/02/1994

General Industry/Product Exams

	Exam	Category	Date
	Securities Industry Essentials Examination (SIE)	SIE	10/01/2018
	General Securities Representative Examination (S7)	Series 7	07/20/1985

State Securities Law Exams

	Exam	Category	Date
	Uniform Investment Adviser Law Examination (S65)	Series 65	11/17/1994
	Uniform Securities Agent State Law Examination (S63)	Series 63	08/15/1985

PROFESSIONAL DESIGNATIONS

This section details that the representative has reported **0** professional designation(s).

No information reported.

Only professional designations listed in Question 8 of the Form U4 will appear in this section if the appropriate box is checked and verified by the issuing organization at the time of the filing. Learn more about eligible designations at [IARD](#) and [NASAA](#).



Registration & Employment History

PREVIOUSLY REGISTERED WITH THE FOLLOWING FIRMS

This representative held registrations with the following firms:

	Registration Dates	Firm Name	ID#	Branch Location
B	10/08/2024 - 11/19/2025	STONEX SECURITIES INC.	CRD# 18456	Lancaster, MA
IA	01/01/1996 - 11/19/2025	TRUST ADVISORY GROUP LTD	CRD# 106926	LANCASTER, MA
B	05/02/1995 - 09/24/2024	AGES FINANCIAL SERVICES, LTD.	CRD# 15427	LANCASTER, MA
B	12/16/1989 - 04/03/1995	LINSKO/PRIVATE LEDGER CORP.	CRD# 6413	FORT MILL, SC
B	07/24/1985 - 12/16/1989	LINSKO FINANCIAL GROUP, INC.	CRD# 524	

EMPLOYMENT HISTORY

Below is the representative's employment history for up to the last 10 years.

Employment Dates	Employer Name	Position	Investment Related	Employer Location
11/2025 - Present	Consolidated Portfolio Review Corp	Investment Advisor Representative	Y	Woodbury, NY, United States
11/2025 - Present	Vanderbilt Securities, LLC	Registered Representative	Y	Woodbury, NY, United States
11/1997 - Present	Starr Investment Services Inc.	Director	N	Lancaster, MA, United States
09/2024 - 11/2025	STONEX SECURITIES INC	REGISTERED REPRESENTATIVE	Y	LANCASTER, MA, United States
04/1995 - 11/2025	Trust Advisory Group Ltd	Investment Advisor Representative	Y	Reading, MA, United States
04/1995 - 09/2024	AGES Financial Services, Ltd.	Registered Representative	Y	Reading, MA, United States

OTHER BUSINESS ACTIVITIES

This section includes information, if any, as provided by the representative regarding other business activities the representative is currently engaged in either as a proprietor, partner, officer, director, employee, trustee, agent, or otherwise. This section does not include non-investment related activity that is exclusively charitable, civic, religious, or fraternal and is recognized as tax exempt.

1) DBA - Starr Investment Services Inc. Investment Related. Start date: 01-01-1995. Address: 34 Squire Shaler Lane, Lancaster MA 01523. Title: Owner. Duties: Meeting with clients & offering financial services through the DBA. Time spent during regular hours: 100%.



Registration & Employment History



OTHER BUSINESS ACTIVITIES

2) Starr Stanley Investment Services. Start date: Start date: 01-01-1995. Address: 34 Squire Shaler Lane, Lancaster MA 01523. Title: Agent. Duties: offer appropriate Insurance products. Time spent during regular hours: 50%.



Disclosure Summary

Disclosure Information

What you should know about reported disclosure events:

(1) Certain thresholds must be met before an event is reported to IARD, for example:

- A law enforcement agency must file formal charges before an Investment Adviser Representative is required to report a particular criminal event.;
- A customer dispute must involve allegations that an Investment Adviser Representative engaged in activity that violates certain rules or conduct governing the industry and that the activity resulted in damages of at least \$5,000.

(2) Disclosure events in IAPD reports come from different sources:

As mentioned in the "About IAPD" section on page 1 of this report, information contained in IAPD comes from Investment Adviser Representatives, firms and regulators. When more than one of these sources reports information for the same disclosure event, all versions of the event will appear in the IAPD report. The different versions will be separated by a solid line with the reporting source labeled.

(3) There are different statuses and dispositions for disclosure events:

- A disclosure event may have a status of *pending*, *on appeal*, or *final*.
 - A "pending" disclosure event involves allegations that have not been proven or formally adjudicated.
 - A disclosure event that is "on appeal" involves allegations that have been adjudicated but are currently being appealed.
 - A "final" disclosure event has been concluded and its resolution is not subject to change.
- A final disclosure event generally has a disposition of *adjudicated*, *settled* or *otherwise resolved*.
 - An "adjudicated" matter includes a disposition by (1) a court of law in a criminal or civil matter, or (2) an administrative panel in an action brought by a regulator that is contested by the party charged with some alleged wrongdoing.
 - A "settled" matter generally represents a disposition wherein the parties involved in a dispute reach an agreement to resolve the matter. Please note that Investment Adviser Representatives and firms may choose to settle customer disputes or regulatory matters for business or other reasons.
 - A "resolved" matter usually includes a disposition wherein no payment is made to the customer or there is no finding of wrongdoing on the part of the Investment Adviser Representative. Such matters generally involve customer disputes.

(4) You may wish to contact the Investment Adviser Representatives to obtain further information regarding any of the disclosure events contained in this IAPD report.



DISCLOSURE EVENT DETAILS

When evaluating this information, please keep in mind that some items may involve pending actions or allegations that may be contested and have not been resolved or proven. The event may, in the end, be withdrawn, dismissed, resolved in favor of the Investment Adviser Representative, or concluded through a negotiated settlement with no admission or finding of wrongdoing.

This report provides the information exactly as it was reported to the Investment Adviser Registration Depository. Some of the specific data fields contained in the report may be blank if the information was not provided.

The following types of events are disclosed about this representative:

Type	Count
Customer Dispute	1
Termination	1

Customer Dispute

This section provides information regarding a customer dispute that was reported to the Investment Adviser Registration Depository (IARD) by the Investment Adviser Representative (IAR), an investment adviser and/or securities firm, and/or a securities regulator. The event may include a consumer-initiated, investment-related complaint, arbitration proceeding or civil suit that contains allegations of sales practice violations against the individual.

The customer dispute may be pending or may have resulted in a civil judgment, arbitration award, monetary settlement, closure without action, withdrawal, dismissal, denial, or other outcome.

Disclosure 1 of 1

Reporting Source: Regulator

Employing firm when activities occurred which led to the complaint: LINSKO/PRIVATE LEDGER CORP.

Allegations: CHURNING; SUITABILITY

Product Type:

Alleged Damages:

Arbitration Information

Arbitration/Reparation Claim filed with and Docket/Case No.: NASD - CASE #95-05316

Date Notice/Process Served: 11/13/1995

Arbitration Pending? No

Disposition: Other

Disposition Date: 09/16/1997

Disposition Detail: AWARD AGAINST PARTY
AWARD AMOUNT \$21,305.00;

.....

Reporting Source: Individual



Employing firm when activities occurred which led to the complaint:

LINSCO/PRIVATE LEDGER CORP.

Allegations:

ALLEGATION MADE THAT ACCOUNTS OF [CUSTOMER](CLAIMANT) WERE EXCESSIVELY TRADED BY RESPONDENTS [OTHER FIRM EMPLOYEE] & STANLEY B. STARR JR., CLAIMANT ALLEGED THAT RESPONDENTS CONTROLLED HIS ACCOUNTS AND MADE TRADES IN THE ACCOUNTS WITHOUT CLAIMANTS ADVICE OR CONSENT.

Product Type:

Alleged Damages:

Customer Complaint Information

Date Complaint Received:

Complaint Pending?

No

Status:

Arbitration/Reparation

Status Date:

Settlement Amount:

Individual Contribution Amount:

Arbitration Information

Arbitration/Reparation Claim filed with and Docket/Case No.:

NATIONAL ASSOC. OF SECURITIES DEALERS; 95-05316

Date Notice/Process Served:

11/13/1995

Arbitration Pending?

No

Disposition:

Award to Customer

Disposition Date:

09/16/1997

Monetary Compensation Amount:

\$21,305.00

Individual Contribution Amount:

Broker Statement

TWENTY-ONE THOUSAND, THREE HUNDRED FIVE DOLLARS TO CLAIMANT.
RESPONDENTS LINSCO/PRIVATE LEDGER AND STANLEY B. STARR JR. MAINTAINED CLAIMANT HAD SEVEN YEARS TRADING EXPERIENCE; HIS INVESTMENT OBJECTIVES INCLUDED SHORT TERM TRADING AND BUSINESSMANS RISK APPRECIATION AND TRADES WERE MADE IN ACCORDANCE WITH CLAIMANTS ACKNOWLEDGED INVESTMENT OBJECTIVES AND FINANCIAL BACKGROUND. NO NET CAPITAL LOSSES WERE INCURRED IN CLAIMANTS PORTFOLIO. MR. STARR MAINTAINED HE WAS NOT RESPONSIBLE FOR [OTHER FIRM EMPLOYEE'S] TRADING ACTIVITIES. LINSCO FURTHER CONTENTED THAT CLAIMANT SELECTED A SHORT TERM STRATEGY, TRANSACTIONS REFLECTED THAT STRATEGY AND CLAIMANT RECEIVED TRADE CONFIRMATIONS AND ACCOUNT STATEMENTS.





Termination

This disclosure event involves a situation where the Investment Adviser Representative voluntarily resigned, was discharged or was permitted to resign after allegations were made that accused the Investment Adviser Representative of violating investment-related statutes, regulations, rules or industry standards of conduct; fraud or the wrongful taking of property; or failure to supervise in connection with investment-related statutes, regulations, rules or industry standards of conduct.

Disclosure 1 of 1

Reporting Source: Individual

Firm Name: LINSICO/PRIVATE LEDGER CORP.

Termination Type: Permitted to Resign

Termination Date: 01/31/1995

Allegations: N/A
IT WAS ALLEGED THAT I ASSISTED ANOTHER REGISTERED REPRESENTATIVE IN PREPARING CORRESPONDENCE TO ONE OF THIS CUSTOMERS THAT CONTAINED AN OFFER TO SUBSIDIZE A PERCENTAGE OF LOSSES.

Product Type:

Other Product Types:

Broker Statement I LEFT LINSICO/PRIVATE LEDGER
THE ALLEGATIONS WERE FALSE. AN NASD INVESTIGATION INTO THE MATTER TERMINATED WITH A DETERMINATION THAT NO ACTION AGAINST ME WAS WARRANTED.



End of Report

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