



IAPD Report

LARRY LYTLE

CRD# 4872962

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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

LARRY LYTLE (CRD# 4872962)

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 **03/26/2026**.

CURRENT EMPLOYERS

	Firm	CRD#	Registered Since
IA	WISER ADVISOR GROUP	CRD# 326579	05/19/2023
B	QUINCY WELLS CAPITAL, LLC	CRD# 334163	03/26/2026

QUALIFICATIONS

This representative is currently registered in **1** SRO(s) and **6** jurisdiction(s).

Is this representative currently Inactive or Suspended with any regulator? **Yes**

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	GREAT POINT CAPITAL LLC	114203	Phoenix, AZ	08/22/2023 - 03/26/2026
B	RBC CAPITAL MARKETS, LLC	31194	PHOENIX, AZ	10/03/2017 - 05/25/2023
IA	RBC CAPITAL MARKETS, LLC	31194	PHOENIX, AZ	10/03/2017 - 05/25/2023

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



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 6 jurisdiction(s) and 1 SRO(s) through his or her employer(s).

This individual has 1 inactive or suspended registration(s).

Employment 1 of 2

Firm Name: **QUINCY WELLS CAPITAL, LLC**
Main Address: 145 SOUTH WELLS STE 1301
CHICAGO, IL 60606
Firm ID#: 334163

Regulator	Registration	Status	Date
B FINRA	General Securities Representative	Inactive - Prints	03/26/2026
B Texas	Agent	Approved	03/27/2026

Branch Office Locations

Phoenix, AZ

Employment 2 of 2

Firm Name: **WISER ADVISOR GROUP**
Main Address: PHOENIX, AZ
Firm ID#: 326579

Regulator	Registration	Status	Date
IA Arizona	Investment Adviser Representative	Approved	05/24/2023
IA California	Investment Adviser Representative	Approved	08/01/2024
IA Florida	Investment Adviser Representative	Approved	01/09/2026
IA South Dakota	Investment Adviser Representative	Approved	12/16/2025
IA Texas	Investment Adviser Representative	Approved	05/19/2023



Qualifications

Regulator	Registration	Status	Date
IA Utah	Investment Adviser Representative	Approved	12/16/2025

Branch Office Locations

WISER ADVISOR GROUP
PHOENIX, AZ



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 0 principal/supervisory exams, 2 general industry/product exams, and 2 state securities law exams.

Principal/Supervisory Exams

Exam	Category	Date
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No information reported.

General Industry/Product Exams

Exam	Category	Date
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B Securities Industry Essentials Examination (SIE)	SIE	10/01/2018
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B General Securities Representative Examination (S7)	Series 7	12/15/2004
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State Securities Law Exams

Exam	Category	Date
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IA Uniform Investment Adviser Law Examination (S65)	Series 65	12/29/2004
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B Uniform Securities Agent State Law Examination (S63)	Series 63	12/29/2004
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PROFESSIONAL DESIGNATIONS

This section details that the representative has reported **1** professional designation(s).

Certified Financial Planner

This representative holds or did hold **1** professional designation(s) that may have been used to qualify as an Investment Advisor representative. Please check with the appropriate designation authority for verification that the designation is still in effect. The contact information for these professional designation authorities can be found on the website for the North American Securities Administrators Association at <http://www.nasaa.org>



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	08/22/2023 - 03/26/2026	GREAT POINT CAPITAL LLC	CRD# 114203	Phoenix, AZ
B	10/03/2017 - 05/25/2023	RBC CAPITAL MARKETS, LLC	CRD# 31194	PHOENIX, AZ
IA	10/03/2017 - 05/25/2023	RBC CAPITAL MARKETS, LLC	CRD# 31194	PHOENIX, AZ
IA	08/31/2009 - 10/04/2017	MERRILL LYNCH, PIERCE, FENNER & SMITH INCORPORATED	CRD# 7691	GILBERT, AZ
B	08/07/2009 - 10/04/2017	MERRILL LYNCH, PIERCE, FENNER & SMITH INCORPORATED	CRD# 7691	GILBERT, AZ
B	06/01/2009 - 08/31/2009	MORGAN STANLEY SMITH BARNEY	CRD# 149777	SCOTTSDALE, AZ
B	12/16/2004 - 06/01/2009	CITIGROUP GLOBAL MARKETS INC.	CRD# 7059	SCOTTSDALE, AZ

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
03/2026 - Present	Quincy Wells Capital, LLC	Registered Representative	Y	Phoenix, AZ, United States
05/2023 - Present	Wiser Advisor Group	Chief Executive Officer	Y	Phoenix, AZ, United States
08/2023 - 03/2026	Great Point Capital, LLC	Registered Representative	Y	Chicago, IL, United States
10/2017 - 05/2023	RBC Capital Markets, LLC	Financial Advisor	Y	Phoenix, AZ, United States
05/2011 - 10/2017	Bank of America, N.A.	Senior Financial Advisor	Y	GILBERT, AZ, United States
08/2009 - 10/2017	MERRILL LYNCH, PIERCE, FENNER & SMITH INCORPORATED	SENIOR FINANCIAL ADVISOR	Y	MESA, AZ, United States



Registration & Employment History

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) CIMARRON GENERAL INVESTMENTS LLC; ADDRESS: 10645 N TATUM BLVD, STE 200-674, PHOENIX, ARIZONA 85028; BUSINESS DESCRIPTION: LLC IS GENERAL PARTNER FOR FRANKLIN INVESTORS, LLLP.; NOT INVESTMENT RELATED; START DATE: 12/29/2014; CAPACITY: OWNER-ACTIVE; DUTIES: PARTICIPANT IN THE BOARD MEETING; HOURS DEVOTED TO THIS OBA PER MONTH: 1; HOURS DEVOTED DURING SECURITIES TRADING: 0;

(2) FRANKLIN INVESTMENTS LLLP; ADDRESS: 10645 N TATUM BLVD, SUITE 200-674, PHOENIX, ARIZONA 85028; NOT INVESTMENT RELATED; BUSINESS DESCRIPTION: LIMITED PARTNERSHIP FOR FAMILY INVESTMENTS; START DATE: 12/29/2014; CAPACITY: OWNER-ACTIVE; DUTIES: ATTEND BOARD MEETINGS; HOURS DEVOTED TO THIS OBA PER MONTH: 1; HOURS DEVOTED DURING TRADING: 1;

(3) FOLDS OF HONOR; ADDRESS: 8711 EAST PINNACLE PEAK ROAD PMB 326, SCOTTSDALE, AZ; BUSINESS DESCRIPTION: NON-PROFIT; NOT INVESTMENT RELATED; START DATE: 01/2024; CAPACITY: TREASURER; DUTIES: GENERAL OVERSIGHT; NUMBER OF HOURS DEVOTED: 10; HOURS DEVOTED DURING TRADING: NONE;

(4) NONPROFIT CONSULTING; ADDRESS: 4616 E Sunset Dr, Phoenix, AZ 85028; NOT INVESTMENT RELATED; BUSINESS DESCRIPTION: PROVIDE CONSULTING TO NON-PROFITS AND CONDUCT SPEAKING ENGAGEMENTS ON NONPROFIT TOPICS; CAPACITY: SOLE PROPRIETOR; START DATE: 7/2/2018; DUTIES: CONTRACTED FOR SPEAKING ENGAGEMENTS ON VARIOUS TOPICS RELATED TO NONPROFITS. CONDUCT LIMITED CONSULTING ENGAGEMENTS WITH NONPROFIT ADMINISTRATIONS AND BOARDS; HOURS DEVOTED PER MONTH: 2; HOURS DEVOTED DURING SECURITIES HOURS PER MONTH: 0.

(5) VIDA NUEVA INVESTMENTS, LLC; ADDRESS: 4616 E Sunset Dr, Phoenix, AZ 85028; PERSONAL RESIDENCE; NOT INVESTMENT RELATED; BUSINESS DESCRIPTION: LLC HOLDING RENTAL REAL ESTATE; CAPACITY: OWNER-ACTIVE; START DATE: 6/1/2009; DUTIES: MANAGE AND ACQUIRE RENTAL REAL ESTATE; HOURS DEVOTED PER MONTH: 1; HOURS DEVOTED DURING SECURITIES HOURS PER MONTH: 0.

(6) NAME OF ENTITY: Vida Nueva Cali
ADDRESS: 802 S Sierra Ave, Solana Beach, CA 92075
INVESTMENT/NOT INVESTMENT RELATED: No
BUSINESS DESCRIPTION: Rental Real Estate
CAPACITY: Owner - Active
START DATE: 10/11/2021
DUTIES: Expense Tracking, Check Writing, Contract tracking
HOURS DEVOTED PER MONTH: 2
HOURS DEVOTED DURING SECURITIES HOURS PER MONTH: 0

(7) NAME OF ENTITY: Lytle Democratization Technologies LLC
ADDRESS: 10645 N Tatum Blvd Ste 200-674, Phoenix AZ 85028
INVESTMENT/NOT INVESTMENT RELATED: No
BUSINESS DESCRIPTION: The LLC focuses on designing and launching technology-based businesses.
CAPACITY: Owner - Active
START DATE: 1/26/22
DUTIES: As one of the two partners, I will help in the crafting of novel business concepts and evaluating partnerships to bring those concepts to market.
HOURS DEVOTED PER MONTH: 5
HOURS DEVOTED DURING SECURITIES HOURS PER MONTH: 0

(8) NAME OF ENTITY: The Ark Project LLC
ADDRESS: 4616 E Sunset Dr, Phoenix, AZ 85028



Registration & Employment History



OTHER BUSINESS ACTIVITIES

INVESTMENT/NOT INVESTMENT RELATED: No

BUSINESS DESCRIPTION: The company will use AI to create customer service alter-egos.

CAPACITY: Owner - Active

START DATE: 2/11/22

DUTIES: I will be an active owner for the business. I will work with the design and direction of the development of a consumer product.

HOURS DEVOTED PER MONTH: 5

HOURS DEVOTED DURING SECURITIES HOURS PER MONTH: 0

(9) NAME OF ENTITY: Wiser Venture, LLC

ADDRESS: 4616 E Sunset Dr, Phoenix, AZ 85028

INVESTMENT/NOT INVESTMENT RELATED: No

BUSINESS DESCRIPTION: Business is engaged in investment banking activities.

CAPACITY: Owner - Active

START DATE: 5/11/23

DUTIES: An active owner of the business

HOURS DEVOTED PER MONTH: 5

HOURS DEVOTED DURING SECURITIES HOURS PER MONTH: 0

Larry Lytle will be the Treasurer at Hugh Lytle for Governor. The address of the Hugh Lytle for Governor is 20044 N 101st Way Scottsdale AZ 85255. The start date is Jan 26, 2026. His duties will be keeping the books for Governor race for Arizona, and he plans to spend 4 hours per month during normal trading hours and 8 hours per month outside of normal trading hours. This is not investment related.



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

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:	Individual
Employing firm when activities occurred which led to the complaint:	WISER ADVISOR GROUP
Allegations:	Customer alleges in 2024 adviser recommended a retirement plan structure that was ill suited for the customer and other causes of action.
Product Type:	Other: Retirement plan
Alleged Damages:	\$20,000.00
Is this an oral complaint?	No
Is this a written complaint?	Yes
Is this an arbitration/CFTC reparation or civil litigation?	No

Customer Complaint Information

Date Complaint Received:	02/12/2026
Complaint Pending?	Yes
Settlement Amount:	
Individual Contribution Amount:	
Broker Statement	Adviser denies any wrong doing related to these allegations.



End of Report

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