



IAPD Report

TANNER RAY FEDELL

CRD# 6046315

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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

TANNER RAY FEDELL (CRD# 6046315)

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 **02/27/2024**.

CURRENT EMPLOYERS

	Firm	CRD#	Registered Since
IA	ONE WEALTH PLANNING LLC	CRD# 328631	02/14/2024

QUALIFICATIONS

This representative is currently registered in **0** 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	CETERA ADVISOR NETWORKS LLC	13572	AUSTIN, TX	08/10/2023 - 02/27/2024
IA	CETERA INVESTMENT ADVISERS LLC	105644	WAXAHACHIE, TX	08/10/2023 - 02/27/2024
IA	SECURIAN FINANCIAL SERVICES, INC.	15296	AUSTIN, TX	03/19/2013 - 08/10/2023

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?

No



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 **0** SRO(s) through his or her employer(s).

Employment 1 of 1

Firm Name: **ONE WEALTH PLANNING LLC**

Main Address: **WAXAHACHIE, TX**

Firm ID#: **328631**

Regulator	Registration	Status	Date
IA Texas	Investment Adviser Representative	Approved	02/14/2024

Branch Office Locations

ONE WEALTH PLANNING LLC

WAXAHACHIE, TX



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 1 state securities law exam.

Principal/Supervisory Exams

Exam	Category	Date
No information reported.		

General Industry/Product Exams

Exam	Category	Date
 Securities Industry Essentials Examination (SIE)	SIE	10/01/2018
 General Securities Representative Examination (S7)	Series 7	02/28/2013

State Securities Law Exams

Exam	Category	Date
  Uniform Combined State Law Examination (S66)	Series 66	01/28/2013

PROFESSIONAL DESIGNATIONS

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

No information reported.



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	08/10/2023 - 02/27/2024	CETERA ADVISOR NETWORKS LLC	CRD# 13572	AUSTIN, TX
IA	08/10/2023 - 02/27/2024	CETERA INVESTMENT ADVISERS LLC	CRD# 105644	WAXAHACHIE, TX
IA	03/19/2013 - 08/10/2023	SECURIAN FINANCIAL SERVICES, INC.	CRD# 15296	AUSTIN, TX
B	03/01/2013 - 08/10/2023	SECURIAN FINANCIAL SERVICES, INC.	CRD# 15296	AUSTIN, TX
IA	03/19/2013 - 10/22/2021	CRI SECURITIES, LLC	CRD# 22589	AUSTIN, TX
B	03/13/2013 - 10/22/2021	CRI SECURITIES, LLC	CRD# 22589	AUSTIN, TX

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
09/2023 - Present	ONE WEALTH PLANNING LLC	MEMBER, CHIEF COMPLIANCE OFFICER, WEALTH ADVISOR	Y	WAXAHACHIE, TX, United States
08/2023 - 01/2024	CETERA ADVISOR NETWORKS LLC	REGISTERED REPRESENTATIVE	Y	AUSTIN, TX, United States
08/2023 - 01/2024	CETERA INVESTMENT ADVISERS LLC	INVESTMENT ADVISOR REPRESENTATIVE	Y	SCHAUMBURG, IL, United States
11/2012 - 01/2024	NORTH STAR CONSULTANTS, INC	AGENT	Y	AUSTIN, TX, United States
11/2012 - 08/2023	MINNESOTA LIFE INSURANCE COMPANY	AGENT	Y	ST PAUL, MN, United States
11/2012 - 08/2023	SECURIAN FINANCIAL SERVICES, INC	REGISTERED REP	Y	ST PAUL, MN, United States
11/2012 - 10/2021	CRI SECURITIES, LLC	REGISTERED REP	Y	ST PAUL, MN, 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.

FARM

POSITION: Owner NATURE: Farm INVESTMENT RELATED: No NUMBER OF HOURS: 10 SECURITIES TRADING HOURS: 0

START DATE: 02/01/2022

ADDRESS: 328 arrowhead rd, Waxahachie TX 75167, United States

DESCRIPTION: we raise animals on our farm

RENTALS

POSITION: Owner NATURE: Rental Property INVESTMENT RELATED: No NUMBER OF HOURS: 0 SECURITIES TRADING HOURS: 0 START DATE: 01/01/2020

ADDRESS: 328 arrowhead rd, Waxahachie TX 75167, United States

DESCRIPTION: my wife's grandfather in law owns rental properties. in exchange for her helping him as well as putting in personal capital we have ownership in a few joint properties. my wife primarily takes care of our involvement. i help with some of the financial aspects.

Tanner Fedell, Waxahachie TX, not investment related insurance only; licensed insurance agent, helping clients evaluate life, disability, and long term care insurance; 4 hours/month; 4 hours /month during trading hours; start date 10/2023.



End of Report

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