

Item 1 Cover Page

06/20/22

Part 2B of Form ADV: Individual Disclosure Brochure  
For  
Kevin E. Phillis  
CRD# 1180361  
Investment Adviser Representative

This brochure supplement provides information about Kevin E. Phillis that supplements Centauri Advisory Group, Inc. brochure. You should have received a copy of that brochure. Please contact Kevin E. Phillis, Investment Adviser Representative if you did not receive the Centauri Advisory Group, Inc. brochure or if you have any questions about this supplement. Additional information about Kevin E Phillis is available on the SEC's website [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov)

CENTAURI ADVISORY GROUP, INC.  
310 S. MAIN ST.  
ZELIENOPLE, PA 16063  
(724) 716-1234  
[www.centauriadvisory.com](http://www.centauriadvisory.com)

## Item 2 Educational Background & Business Experience

Name: Kevin E. Phillis Born: 1959

Education Background:

Robert Morris University – 1982 Bachelor of Science – Business Marketing & Finance

Penn State University – 1980 Associates Degree – Business Administration

The American College – 1991 Chartered Financial Consultant

Certified Insurance Consultant – 2007

ChFC. A [financial planning](#) designation for the [insurance industry](#) awarded by the American College of Bryn Mawr. ChFCs must [meet experience](#) requirements and [pass](#) exams covering [finance](#) and [investing](#). They must have at least three years of experience in the [financial](#) industry, and have studied and passed an [examination](#) on the [fundamentals](#) of financial [planning](#), including [income tax](#), insurance, [investment](#) and [estate planning](#)

Business Background:

2011 - Present CEO of Centauri Advisory Group, Inc.

2007 - Present Registered Rep. Trustmont Financial Group

1995 – 2006 Registered Representative Olde Economie Financial Consultants

1994 – Present Account Representative Jack L Bonus Insurance Agency

1983 – 1995 Registered Representative Prudential Financial Services

## Item 3 Disciplinary Information

There have been no disciplinary events

## Item 4 Other Business Activities

Kevin E. Phillis is also licensed to sell insurance products. The insurance product may generate a commission to the insurance agent who is also an adviser. Insurance products offered can be, but are not limited to: life insurance, annuities, indexed annuities, health insurance, disability insurance, long term care insurance, and property and casualty insurance in the state of PA.

Kevin E. Phillis is also a Registered Rep. with Trustmont Financial Group. A broker/dealer registered with the SEC, FINRA and various state regulatory agencies. A registered representative of Trustmont Financial Group, Inc. may receive a commission in mutual funds, equities, bonds, variable annuities and other investment products on behalf of clients, who may or may not have an advisory fee agreement with Trustmont Advisory Group, Inc. This relationship may create a conflict of interest as an investment advisor representative may also receive commissions as a registered representative of Trustmont Financial Group, Inc.

Kevin E. Phillis is an active property, casualty and life insurance agent for Jack L. Bonus Agency in Zelienople, PA. Compensation is received in the form of commission and renewal fees. There is no conflict of interest.

### Item 5 Additional Compensation

Kevin E. Phillis does receive compensation from the commissions earned from of his insurance clients. Professional services and fees of Kevin E. Phillis Insurance practice are entirely separate and distinct from CAG's investment advisory services and fees.

Kevin E. Phillis does receive compensation from the commissions earned from his Trustmont Financial Group RR clients. Professional services and fees of Kevin E. Phillis RR practice are entirely separate and distinct from CAG's investment advisory services and fees.

### Item 6 Supervision

Centauri Advisory Group, Inc. has created policies and procedures reasonably designed to prevent violation of the Investment Advisers Act of 1940 and the rules that the Security and Exchange Commission have adopted under the Act. *Kevin E. Phillis* and all IAR's under Centauri Advisory Group must adhere to all policies and procedures adopted by the firm. These guidelines include but are not limited to: As an investment adviser representative *Kevin E. Phillis* must provide advice that is in the client's best interest and must not place his interests ahead of the client's interest under any circumstances. *Kevin E. Phillis* must follow specific fiduciary obligations when dealing with clients, obligations such as but not limited to: the duty to have a reasonable, independent basis for the investment advice provided, the duty to ensure that investment advice is suitable to meeting the client's individual objectives, needs and circumstances and a duty to be loyal to clients. Engaging in any fraudulent or deceitful conduct with clients or potential client is strictly prohibited. Examples of fraudulent conduct include, but are not limited to: misrepresentation, nondisclosure of fees and/or misappropriation of client funds.

Kevin E. Phillis is supervised by R. Douglas Falk, CFO, and C. Scott Ellis, CCO of Centauri Advisory Group, Inc. Contact information is on the cover page of this supplement.