

ROBERT CASSELLA

FIRM SUPPLEMENTAL BROCHURE (ADV PART 2B)

MARCH 20, 2024

Cross State Financial Group, LLC

Main Office

***8421 Osuna Road NE, Suite C
Albuquerque, NM 87111
Phone: (800) 621-6974
www.crossstatefinancial.com***

Branch Office

***19296 County Rd 68
Robertsdale, AL 36567
Phone: (800) 621-6974
Rob@CrossStateFinancial.com***

This Brochure Supplement provides information about Robert Cassella that supplements the Cross State Financial Group, LLC's Brochure. You should have received a copy of that Brochure. Please contact Mr. Cassella at (800) 621- 6974 if you did not receive Cross State Financial Group, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Robert Cassella is available on the SEC's website at www.adviserinfo.sec.gov. You can search this site by a unique identifying number, known as a CRD number. The CRD number for Mr. Cassella is 1596984.

ITEM 2 – EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

ROBERT CASSELLA

Born: 1964

Education: *Indiana University* – B.S. in Finance – 1986

Business Background:

Cross State Financial Group, LLC – November 2016 to Present

– Investment Adviser Representative

Crown Capital Securities, L.P. – November 2016 to December 2018

– Registered Representative

Legal Services – September 2010 to December 2019

– Trustee

Foothill Securities, Inc. – January 2010 to October 2016

– Registered Representative

Insurance Sales – April 2007 to December 2022

– Agent

Next Financial Group – February 2007 to December 2009

– Registered Representative

Salomon Smith Barney – March 2001 to February 2007

– Registered Representative

ITEM 3 – DISCIPLINARY HISTORY

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. No information is applicable to this Item.

ITEM 4 – OTHER BUSINESS ACTIVITIES

Mr. Cassella has no other business activities to report.

ITEM 5 – ADDITIONAL COMPENSATION

Mr. Cassella does not receive any additional compensation.

ITEM 6 – SUPERVISION

Mr. Cassella is overseen by the Adviser's Chief Compliance Officer, Danielle E. Mutz. Ms. Mutz reviews all new accounts opened by Mr. Cassella. Ms. Mutz can be reached at (800) 621-6974.