

A Summary of Your Advisory Relationship with



Introduction: Price Wealth, LLC (“Price Wealth”) is an independent wealth manager based in Austin, Texas registered with the United States Securities and Exchange Commission (“SEC”). Brokerage and investment advisory services and fees differ, and it is important for you to understand the differences. Free and simple tools are available to research firms and financial professionals at Investor.gov/CRS, which also provides educational materials about broker-dealers, investment advisers, and investing.

Items	Explanation	Conversation Starters
<p>Relationships and Services</p> <p>What investment services and advice can you provide me?</p>	<p><i>We provide wealth management and investment advisory services to high net worth individuals and charitable organizations (“Clients”). We consult with our Clients to gather data and determine, among other things, their (i) net worth and current assets (liquid and illiquid); (ii) expense estimates and cash flow needs; (iii) tax considerations; (iv) estate and charitable considerations and plans; and (v) risk assessment. We carefully review and analyze this data by considering a Client’s goals, the degree of variability in investment returns a Client is willing to withstand, and then make individualized recommendations.</i></p> <p><i>Our recommendations address the following issues: (i) cash flow planning; (ii) asset allocation; (iii) criteria for selection of investment products; (iv) procedures for monitoring investment vehicles (timing and benchmarks); (v) estate “location” and tax considerations; and (vi) policy for portfolio management and rebalancing.</i></p> <p><i>The primary investment strategy that we use is strategic and tactical asset allocation. We determine the strategic asset allocation based on a Client’s constraints and needs. We then make recommendations for tactical asset allocations to take advantage of asset class mispricing or other unique opportunities.</i></p> <p><i>We research potential investments for Client portfolios, focusing on quantitative and qualitative factors. We perform initial due diligence for new investments, and we regularly monitor investments selected for Client portfolios.</i></p> <p><i>We manage assets on both a discretionary and nondiscretionary basis depending on the Client’s needs and preferences. For discretionary services, we are the agent and attorney-in-fact with full power and authority on the Client’s account (i) to direct, manage, and/or change the investment and reinvestment of assets; (ii) to buy, sell, exchange, convert and otherwise trade in any and all stocks, bonds, and other securities products or investment instruments as Adviser may select. For nondiscretionary assets, we advise, but the Client makes the final decision regarding the purchase or sale of investments.</i></p>	<ul style="list-style-type: none"> • <i>Given my financial situation, should I choose an investment advisory service? Why or why not?</i> • <i>How will you choose investments to recommend to me?</i> • <i>What is your relevant experience, including your licenses, education and other qualifications? What do these qualifications mean?</i>
<p>Fees, Costs, Conflicts and Standard of Conduct</p> <p>What fees will I pay?</p>	<p><i>Fees for each Client are established based upon consideration of several factors, including the complexity and scope of the services to be provided, the amount of assets under management, and any special service needs of the Client. The maximum advisory fee we charge for assets under management is 1.00% per year. We do not require a minimum amount of investable assets per account, but we do have a minimum annual fee of \$30,000 per year. Fixed fees are negotiable.</i></p> <p><i>Clients utilizing third-party money managers are charged investment-related fees in addition to the advisory fee we charge. This is described in greater detail in ADV Part 2A. You will pay fees and costs whether you make or lose money on your investments.</i></p> <p><i>Fees and costs will reduce any amount of money you make on your investments over time. Please make sure you understand what fees and costs you are paying.</i></p>	<ul style="list-style-type: none"> • <i>Help me understand how these fees and costs might affect my investments. If I give you \$10,000 to invest, how much will go to fees and costs, and how much will be invested for me?</i>

<p>Obligations / Conflicts of Interest</p> <p>What are your legal obligations to me when acting as my investment adviser?</p> <p>How else does your firm make money and what conflicts of interest do you have?</p> <p>How do your financial professionals make money?</p>	<p><i>When we act as your investment adviser, we act in your best interest and put your interest ahead of ours. There are some situations that could result in a conflict of interest with a Client as follows:</i></p> <p><i>On occasion, we may own securities products that we recommend to Clients.</i></p> <p><i>The only source of revenue to our firm is from our Clients. We receive benefits from Schwab in the form of support products and services based on our Clients that custody assets with them. These products and services, how they benefit us, and the related conflicts of interest are described in greater detail in ADV Part 2A, Item 12.</i></p> <p><i>As described in the section above for the firm, our financial professionals are compensated based upon a percentage of the assets under management of our Clients.</i></p>	<ul style="list-style-type: none"> • <i>How might your conflicts of interest affect me, and how will you address them?</i>
<p>Disciplinary History</p> <p>Do you or your financial professionals have legal or disciplinary history?</p>	<p>No.</p>	<ul style="list-style-type: none"> • <i>As a financial professional, do you have any disciplinary history? For what type of conduct?</i>
<p>Additional Information</p>	<p>Please visit our website (www.pricewealth.com) or reference our ADV Part 2A for additional information. To request up-to-date information or request a copy of the relationship summary, you can email us at team@pricewealth.com or call 512.320.8555.</p> <p><i>Price Wealth Team:</i></p> <p><i>Eric Price, Founder, President & CIO (eric@pricewealth.com)</i></p> <p><i>Susan Wittliff, Principal, Senior Wealth Advisor & CCO (susan@pricewealth.com)</i></p> <p><i>Cynthia Mendoza, Senior Director of Operations (cynthia@pricewealth.com)</i></p> <p><i>Matt Butterfield, Associate (matt@pricewealth.com)</i></p>	<ul style="list-style-type: none"> • <i>Who is my primary contact person? Is he or she a representative of an investment adviser or a broker-dealer? Who can I talk to if I have concerns about how this person is treating me?</i>