



Form CRS Client Relationship Summary May 2020

Introduction:

Wacker Wealth Partners, LLC (“WWP”) is an investment advisor registered with the Securities and Exchange Commission. We feel it is important for you to understand how advisory and brokerage services and fees differ in order to determine which type of arrangement is right for you. There are free and simple tools available to research firms and financial professionals at www.investor.gov/CRS which also provides educational materials about investment advisors, broker-dealers and investing.

What types of investment services and advice can you provide me?

As an SEC registered investment advisor, WWP offers its investment advisory services to retail investors for an ongoing asset-based fee, based on the value of your cash and investments managed by WWP. Our advisory services include wealth management, financial planning, consultations on wealth transfer, estate planning, income tax planning, retirement planning, education funding and charitable gifting. If you engage us as your investment advisor, we’ll meet with you to understand your current financial situation, existing resources, goals, and factors, including risk tolerance, affecting your investment plan. Based on what we learn, we’ll together agree on a personal written investment policy for you and recommend a portfolio of investments that is regularly monitored and if necessary, adjusted and rebalanced to meet your changing needs, stated goals and objectives.

Our accounts are managed on a discretionary basis, which means we don’t need to call you when buying or selling in your account(s) within the parameters of your investment policy. You will sign an investment management agreement giving us this authority. This agreement will remain in place until you or we terminate the relationship. Additional information about our advisory services is located in Item 4 of our Firm Brochure, which is available online at www.WackerWealthPartners.com.

Questions to Ask Us:

- Given my financial situation, should I choose an investment advisory service? Why or why not?
- How will you choose investments to recommend to me?
- What is your relevant experience, including your certification, education and other qualifications? What do those qualifications mean?

What fees and costs will I pay?

Fees and costs affect the value of your portfolio over time. Please ask your advisor to give you personalized information on the fees and costs that you will pay. You will be charged a fee according to a fee schedule that is calculated and collected on a quarterly basis based on the value of the investments in your account(s), subject to a minimum fee schedule. Our percentage fee schedule ranges from .30% to 1.00% annually, depending on the value of the investments in your portfolio. Our fees vary depending on the type of client (retail, institutional, non-profit, etc.). Our incentive is to increase the value of your portfolio over time, which will increase our fees over time. The quarterly fees may be automatically deducted from your account or paid directly to WWP.

The broker-dealer (custodian) that holds your assets may charge you a transaction fee when we buy or sell an investment for you. The broker-dealer's transaction fees are in addition to our advisory fee for our investment advisory service.

You might also pay charges imposed by the broker-dealer holding your accounts for certain investments and for maintaining your account. Some investments, such as mutual funds and exchange traded funds, charge additional fees within the fund that will reduce the value of your investments over time. Additional information about our fees is located in Item 5 of our Firm Brochure. Our Firm Brochure is available online at www.WackerWealthPartners.com.

Questions to Ask Us:

- Help me understand how these fees and costs will affect my investments. If I give you \$500,000 to invest, how much will go to fees and costs and how much will be invested for me?
- How do you determine what fee I will be charged?

What are your legal obligations to me when acting as my investment advisor? How does your firm make money and what conflicts of interest do you have?

When we act as your investment advisor, we have a fiduciary duty to place your interest ahead of the firm's and any individual advisor's interests. Additional information about our conflicts of interest can be found in our Firm Brochure under Item 11 which is available online at www.WackerWealthPartners.com.

WWP's revenue is from the advisory fees we collect from your accounts each quarter. Our financial professionals are employees of the firm and are paid a fixed monthly salary. They also are eligible for quarterly bonuses, unconnected with any account investment performance.

Do you or your financial professionals have legal or disciplinary history?

No, we are proud to share that neither our firm nor our financial professionals have any legal or disciplinary history. Visit Investor.gov/CRS for a free and simple search tool to research our firm and our financial professionals.

Additional Information

You can find additional information about our firm's investment advisory services on the SEC's website at www.adviserinfo.sec.gov by searching CRD #145931. You may also contact our firm at (805) 541-1308 and talk to any one of our financial professionals or support staff.

Questions to Ask Us:

- Who is my primary contact person?
- Is he or she a representative of an investment advisor or a broker-dealer?
- Who can I talk to if I have concerns about how this person is treating me?



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