

FORM CRS (Client Relationship Summary)

Premier Path Wealth Partners, LLC
March 6, 2024

Introduction

Premier Path Wealth Partners, LLC, an investment adviser registered with the Securities and Exchange Commission and, as such, we provide advisory services rather than brokerage services. Brokerage and investment advisory services and fees differ, and it is important for you, our client, to understand the differences. Additionally, free and simple tools are available to research firms and financial professionals at [Investor.gov/CRS](https://investor.gov/CRS), which also provides educational materials about broker-dealers, investment advisers, and investing.

What investment services and advice can you provide me?

We offer the following investment advisory services to investors: Portfolio Management Services; Financial Planning & Consulting Services; and Retirement Consulting Services. For more detailed information regarding our services, fees and other disclosures for our firm, please refer to Items 4, 5, 7, 8, 13, and 16 in our Form ADV Part 2A Brochure in this link:

<https://adviserinfo.sec.gov/firm/brochure/325300>.

- **Account Monitoring:** If you choose to open an advisory account with us, as part of our standard services, we will meet with you initially to assess your current financial situation. Depending on your financial situation, we will recommend a financial strategy that is tailored to your financial needs. Our firm will monitor your investments on at least an annual basis.
- **Investment Authority:** We offer investment accounts on both a discretionary basis and on a rare occasion, non-discretionary basis. In a discretionary account, we have discretion to select, retain, or replace third-party managers to manage your account(s). You do have the option to limit discretionary authority by providing us with your restrictions and guidelines in writing. On rare occasions, in a non-discretionary account, we will provide advice, but ultimately you decide which investments to buy and sell for your account(s).
- **Investment Offerings:** We provide advice on various types of investments, and we do not restrict our advice to limited types of products or investments.
- **Account Minimums and Requirements:** We generally require a \$1,000,000 minimum investment amount to open an account with us. However, exceptions can be made on a case-by-case basis.

Conversation Starter:

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 licenses, education and other qualifications? What do these qualifications mean?

What fees will I pay?

You will be charged an annual ongoing fee, paid on a quarterly basis on the value of the assets in your account. Our maximum Portfolio Management Services annual fee is 1.50%. The more assets you have in your advisory account, the more you will pay. We therefore have an incentive to increase the assets in your advisory account in order to increase our fees. The amount you pay will depend, for example, on the services you receive and your account value. Our firm's fees will be automatically deducted from your advisory account. If appropriate, in some cases we may mutually decide to send an invoice rather than automatically deduct our fees from your advisory account.

Financial planning / Consulting fees will be charged at an hourly or fixed rate as agreed upon by you and the firm. You can find more information about our fees and costs under Item 5 of our Disclosure Brochure or Item 4 of Appendix 1 to our Disclosure Brochure, available at [Investor.gov/CRS](https://investor.gov/CRS).

In addition to advisory and possibly transaction fees, there are additional fees such as possible transfer, SEC, and exchange fees for sales of securities, and similar fees. These additional fees are not material, but like advisory fees and custodian fees, they do have an adverse impact on the value of your portfolio over time.

You will pay fees and costs whether you make or lose money on your investments. 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. Additional information about our fees is in Item 5 of our Firm Brochure, which is available online at <https://adviserinfo.sec.gov/firm/brochure/325300>.

Conversation Starters:

[Help me understand how these fees and costs may 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?](#)

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

When we act as your investment adviser, we have to act in your best interest and not put our interests ahead of yours. At the same time, the way we make money creates some conflicts of interest. You should understand and ask us about these conflicts, because they can affect the investment advice we provide you.

Here is an example to help you understand what this means:

Certain financial professionals providing investment advice on behalf of our firm are licensed as independent insurance agents. On a very rare occasion, if these insurance agents sell an insurance product, they will earn a commission. Insurance commissions are separate and in addition to our advisory fees. This practice presents a conflict of interest because they have an incentive to recommend insurance products to you for the purpose of generating additional commissions.

Additional information about our conflicts of interest is in our Form ADV Part 2A Brochure which can be accessed online at <https://adviserinfo.sec.gov/firm/brochure/325300>.

Conversation Starter:

[How might your conflicts of interest affect me, and how will you address them?](#)

How do your financial professionals make money?

Our financial professionals are compensated by our firm from revenue paid to the firm for advisory services and consulting services rendered to our clients. Advisory fees are based on the amount of client assets they service and the time and complexity required to meet a client's needs. Financial Planning / Consulting fees may be a flat fee or an hourly fee and are based on the scope and complexity of our engagement with the client

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

Yes. Visit Investor.gov/CRS for a free and simple search tool to research our firm and financial professionals.

Conversation Starter:

[As a financial professional, do you have any disciplinary history? For what type of conduct?](#)

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 #325300. You may also contact our firm at (973) 671-6530 to request a copy of this relationship summary and other up-to-date information.

Conversation Starter:

[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?](#)