



Client Relationship Summary

February 20, 2024

Introduction

Landmark Wealth Management, LLC (“Landmark”) is registered with the Securities and Exchange Commission as an investment adviser. 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](https://www.investor.gov/CRS), which also provides educational materials about broker-dealers, investment advisers, and investing.

What investment services and advice can you provide me?

Landmark offers investment advisory and financial planning services to individuals, high net-worth individuals, pension and profit sharing plans, and business.

Investment advisory services are offered on a discretionary basis where Landmark works with each client to identify their investment goals and objectives as well as risk tolerance and financial situation in order to create a portfolio allocation. Landmark’s investment strategy is primarily long-term focused, but the Advisor may buy, sell or re-allocate positions that have been held less than one year to meet the objectives of the Client or due to market conditions. Each Client will have the opportunity to place reasonable restrictions on the types of investments to be held in their respective portfolio, subject to the acceptance by Landmark.

Landmark’s financial planning services generally involve preparing a financial plan or rendering a financial consultation for clients based on the client’s financial goals and objectives. This can include one or more areas, including, but not limited to investment planning, retirement planning, personal savings, education savings.

For more detailed information, please refer to our Disclosure Brochure, the [Form ADV Part 2A](#), under Item 4 Advisory Business and Item 7 Types of Clients.

What fees will I pay?

Landmark charges annual fees starting at 0.80% to 1.00% for account portfolio management based upon the amount of assets the client engages Landmark to manage. Fees decrease as the amount of assets under management increases. These fees are negotiable at the sole discretion of the advisor based upon the size and complexity of the client relationship. The account portfolio management fee is exclusive of, and in addition to brokerage fees, transactions fees, and other related costs and expenses, which may be incurred by the client. However, Landmark will not receive any portion of the commissions, fees and costs.

Landmark provides financial planning and consulting services to clients as part of its comprehensive wealth management. Landmark does not charge a separate fee for these services to our fee-paying clients. For non-fee-paying Clients, Landmark may provide financial planning and consulting services at an hourly rate of \$250 per hour, which may be negotiable depending on the nature and complexity of each client’s circumstances.

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. For more specific information regarding our fees, please refer our Disclosure Brochure, the [Form ADV Part 2A](#) under Item 5 Fees and Compensation.



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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 interest ahead of yours. At the same time, the way we make money creates some conflicts with your interests. You should understand and ask us about these conflicts because they can affect the investment advice we provide you.

For example, financial planning and consulting recommendations may pose a potential conflict between the interests of Landmark and the interests of the client. Clients are not obligated to implement any recommendations made by Landmark or maintain an ongoing relationship with Landmark. If the client elects to act on any of the recommendations made by Landmark, the client is under no obligation to effect the transaction through Landmark.

For more specific information regarding compensation and conflicts, please refer our Disclosure Brochure, the [Form ADV Part 2A](#) under Item 10.

How do your financial professionals make money?

Financial professionals of Landmark are paid a portion of the advisory fees collected from clients. Financial professionals are not rewarded sales bonuses.

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

No. Free and simple tools are available to research firms and financial professionals at investor.gov/CRS.

Additional Information

Additional information about our investment advisory services can be found at LandmarkWealthMgmt.com. A copy of our relationship summary can also be requested by calling (888) 342-6436.

Here are some *conversation starters* to ask us that are recommended by the SEC:

- *Given my financial situation, should I choose an investment advisory service? Should I choose a brokerage service? Should I choose both types of services? 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?*
- *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?*
- *How might your conflicts of interest affect me, and how will you address them?*
- *As a financial professional, do you have any disciplinary history? For what type of conduct?*
- *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?*