

Signature Wealth Management Group - Client Relationship Summary

August 29, 2023

Our firm is registered with the Securities and Exchange Commission as an Investment Adviser. It is important for you to understand that brokerage and investment advisory services and fees differ. Free and simple tools are available to research firms and financial professionals at [Investor.gov/CRS](https://investor.gov/CRS), which also provide educational materials about broker-dealers, investment advisers, and investing.

What investment services and advice can you provide me?

We offer investment advisory services to retail investors. Our services include Asset Management and Financial Planning and Consulting Services. We will meet with you initially to understand your goals and help you determine the portfolio of investments to suit your objectives. We will then offer to meet with you at least annually to review your portfolio.

Financial Planning is included in our Asset Management services at no additional cost. Financial Planning is also available as a separate service for a fee in which your investments are not monitored on an ongoing basis. In addition to Financial Planning, we also offer Consulting services on various financial topics to address your specific needs and objectives. Consulting services can be narrow in scope and are provided pursuant to a separate agreement for a negotiated, agreed upon fee.

We manage accounts on a discretionary basis which means we do not need your authorization to make changes in the portfolio. If there are any limitations, this will be outlined in the advisory services agreement you sign with our firm. We do not restrict our advice to limited types of investments. The minimum portfolio value is generally set at \$125,000. The minimum annual fee for any portfolio is \$1,500. Our firm will, at its discretion, make exceptions to the foregoing or negotiate special fee arrangements where we deem it appropriate under the circumstances.

Additional information about our advisory services can be found in Item 4 of our Firm Brochure which are available online at <https://adviserinfo.sec.gov/firm/summary/285713>.

Key Questions to Ask Your Financial Professional

- *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 a quarterly fee based on the value of your accounts. Depending on the value of your accounts the advisory fee will be between .50% and 1.20%. The more assets you have in your advisory account, the more you will pay us. We therefore have an incentive to increase the assets in your advisory account in order to increase our fees. Our fees vary and are negotiable. The amount you pay will depend, for example, on the services you receive and the amount of assets in your account. Our firm's fees will be automatically deducted from your advisory account, which will reduce the value of your advisory account. In rare cases, our firm will agree to send you invoices rather than automatically deduct our firm's fees from your advisory account.

Ongoing financial planning services are provided for an annual fee of \$1,500 billed quarterly. Stand- Alone financial planning is provided for a one-time fee of \$750. Payment is due upon receipt of the signed financial planning agreement. Payments are made through AdvicePay. Consulting services are provided for a one-time fee ranging from \$750 up to \$10,000 depending on the complexity of the service. Payments are made through AdvicePay.

The custodian that holds your assets charges you a transaction fee when we buy or sell an investment for you. Their fees are in addition to our firm's fees for our Asset Management service. You may also pay charges imposed by the custodian holding your accounts for certain investments and maintaining your account. Some investments, such as mutual funds, index funds, exchange traded funds, and variable annuities, charge additional fees that will reduce the value of your investments 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 are available online at <https://adviserinfo.sec.gov/firm/summary/285713>.*

Key Questions to Ask Your Financial Professional

- *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?*

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. Here are some examples to help you understand what this means.

Four of our firm's financial professionals are licensed insurance agents who may sell insurance products for a commission. They have an incentive to recommend insurance products to you in order to increase their compensation. However, we will always notify you of any insurance recommendation that will generate a commission for our firm.

Additional information about our conflicts of interest is located in Items 5 and 10 of our Firm Brochure, which are available online at <https://adviserinfo.sec.gov/firm/summary/285713>.

Key Questions to Ask Your Financial Professional

- *How might your conflicts of interest affect me, and how will you address them?*

How do your financial professionals make money?

Our Company and the financial professional servicing your account(s) are compensated in the following ways: salary; firm-wide incentive pay. Our financial professionals' compensation is based on the amount of client assets they service, which is a conflict of interest in that our financial professionals are incentivized to refer clients to our firm.

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

No. Visit [Investor.gov/CRS](https://investor.gov/CRS) for free and simple search tool to research your financial professionals.

Key Questions to Ask Your Financial Professional

- *As a financial professional, do you have any disciplinary history? For what type of conduct?*

You can find additional information about your investment advisory services and request a copy of the relationship summary at 678-932-2500 or click this link <https://adviserinfo.sec.gov/firm/summary/285713>.

Key Questions to Ask Your Financial Professional

- *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?*

Signature Wealth Management Group, LLC
February 28, 2024

Exhibit to Form CRS

Signature Wealth Management Group, LLC is required to update its Form CRS when information in the Form CRS becomes materially inaccurate. This Exhibit summarizes the following material changes to the firm's Form CRS, implemented on February 28, 2024:

Corrected how our financial professionals' are compensated and updated how many are licensed insurance agents.