

Customer Relationship Summary (Form CRS) – March 2024

Introduction

Wizest, Inc. (“Wizest”) 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 these differences. The SEC offers free and simple tools to research firms and financial professionals at www.investor.gov/CRS, which also provides educational materials about broker-dealers, investment advisers and investing.

Relationships and Services

What investment services and advice can you provide me?

Wizest offers its investment advisory services through the use of a mobile, web-based investment advice application. Portfolio allocations will be generated based on a proprietary algorithm on information from the client regarding income, risk tolerance, investment objective and other financial information. Wizest is a robo-adviser and the only way to receive investment advisory services is via a mobile device and user account.

As part of our investment management services, we offer portfolios of securities formulated by Investment Experts. Clients select one or more portfolios generated based upon their input. We execute investment recommendations you select and then rebalance the portfolio as needed, in accordance with your investment objectives and risk profile, on a discretionary basis. Wizest does not require a minimum balance to become a subscriber of our mobile application and its features. However, our custodian, Apex Clearing Corporation, may impose account minimums or other restrictions. We reserve the right to waive or reduce certain fees based on unique individual circumstances, special arrangements, or preexisting relationships.

For more detailed information on our relationships and services, please see Item 4 – Advisory Services and Item 7 – Types of Clients of our Form ADV Part 2A.

<https://www.adviserinfo.sec.gov/IAPD/default.aspx>.

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?

Fees, Costs, Conflicts and Standard of Conduct

What fees will I pay?

Wizest charges a Platform Subscription Fee for a monthly or annual subscription. In addition to the Platform Subscription Fee, account balances over \$50,000 are charged an annualized (payable monthly) Investment Management Fee of 0.50%. Both fees are charged in advance. Our fees are not negotiable. Occasionally, and at our discretion, we will offer reduced or waived Platform Subscription Fee for new users during promotional periods. In addition to our Platform Subscription Fee and Investment Management Fees, you will be responsible for custodian fees, account maintenance fees, transaction fees, mutual fund fees, and other miscellaneous account service fees.

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. The only compensation received from advisory services is the fees charged for providing investment advisory services as described above. Wizest receives no other forms of compensation in connection with providing investment advice.

For additional information about our fees and costs, please see Item 5 – Fees and Compensation of our Form ADV Part 2A available at <https://www.adviserinfo.sec.gov/IAPD/default.aspx>.

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?

Ask your financial professional: How might your conflicts of interest affect me, and how will you address them?

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 that we provide you. Here are some examples to help you understand what this means. Although custodial services may be found cheaper elsewhere, we will require that you open your account with Apex Clearing Corporation where we have an institutional relationship which allows for us to deduct our fees and have access to conduct transactions on your account.

For additional information, please see Item 12 – Brokerage Practices and Item 14 – Client Referrals and Other Compensation of our Form ADV Part 2A available at <https://www.adviserinfo.sec.gov/IAPD/default.aspx>.

How do your financial professionals make money?

The firm is compensated by means of subscription fees and investment management fees. Our Investment Experts are provided with base compensation which decreases progressively over a period of fifteen (15) months. Additional compensation is based on the number of followers they have, user satisfaction ratings and the risk rating of their portfolios.

Disciplinary History

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

No, we do not have any legal or disciplinary history. Visit www.investor.gov/CRS for a free and simple search tool to research us and our financial professionals.

Ask your financial professional: As a financial professional, do you have any disciplinary history? For what type of conduct?

Additional Information

You can find additional information about our investment advisory services by visiting <https://www.sec.gov/check-your-investment-professional> and searching with our CRD number (315156) or by visiting www.wizest.com. You can request current information and a copy of our client relationship summary by contacting wizest@venturissolutions.net.

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