

December 31, 2023

LXG WEALTH ADVISORY RELATIONSHIP SUMMARY

LXG Wealth Advisors (LXG) is organized as a Florida limited liability company under the laws of the State of Florida and is a registered Investment Adviser with the SEC. LXG has been in business since May 2021.

It is important that you are aware of the relationship you can establish through LXG. Through LXG you will establish an investment advisory relationship. Investment advisory and brokerage relationships and services differ in many ways, including the duty of an advisor with the client and way services are charged. In general, brokers charge commissions on each trade that you do, and advisors charge a fee which is calculated based on the assets that they manage for you. Also, bear in mind that that an advisor has a fiduciary duty with you, while a broker has a duty to only recommend securities that are in your best interest.

Free and simple tools are available to research firms and financial professionals at, 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 **advisory services**:

LXG Services						
Product Offered	Type of Relationship	Service Provided	Execution of transactions	Account Monitoring	Discretion on implementing strategies	Custody of Clients Funds or Securities
Investment Advisory Mandate	Non discretionary Investment Advisory Agreement/Mandate	Investment Advice on securities and strategies Supervision of Strategy	No, execution of transactions are through a brokerage account held with a qualified custodian, but, client has the option of authorizing LXG to transmit order to custodians on its behalf, yet the client must approve the transaction to the custodian.	Yes	No	No, LXG will not have custody of client's funds or securities. Clients must establish a relationship with a qualified custodian.
Investment Advisory Mandate	Discretionary Investment Advisory Agreement/Mandate		Yes	Yes	Yes	No, LXG will not have custody of clients' funds or securities. Clients must establish a relationship with a qualified Custodian.

The investment advice we may provide may be made in any of the following:

- *Equities*
- *Fixed Income including corporate, emerging market, government, & municipal bonds*
- *Mutual Funds*
- *Exchange Traded Funds*
- *Private investment funds*

It is important that you are aware that LXG will monitor your account as a part of the standard service provided. LXG does not have any material limitations on the type of Advisory relationship it can provide you, however, we generally only accept accounts with at least \$5 million. For additional information on products services provided, please refer to LXG's ADV Part 2A for more details regarding the products we may provide advice on.

WE RECOMMEND THAT YOU ASK THESE QUESTION TO YOUR FINANCIAL ADVISOR:

"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?

LXG clients should expect to pay ongoing asset-based fee that is a percentage (%) on assets under management. Generally, advisory fees are calculated and billed on a quarterly basis, payable in advance. In addition, clients may expect to pay fees including platform fees and other operational related fees. All of the fees that will be assessed are fully disclosed in your advisory agreement.

Things to keep in mind: a) when holding an advisory account, the investor is charged an advisory based fee which may include transactions costs and fees to a broker dealer or bank for the execution of transactions. Keep in mind, that in general terms, if you hold more assets in your advisory account, you may receive a lower fee in percentage terms. This, however, does not necessarily mean you will pay less in fees. Therefore, LXG may have an incentive to encourage the investor to increase the assets in his or her account. b) you will pay fees and costs whether you make or lose money on your investments and c) 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. You may also find more detailed information about our fees, their calculation and billing frequency on our Form ADV Part 2A under the section titled "Item 5 – Fees and Compensation". You may find our Form ADV Part 2A at <https://adviserinfo.sec.gov/firm/summary/315952>.

In regard to fees and costs, a good, related question when speaking to your account executive:

"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 AN INVESTMENT ADVISOR? 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 as a fiduciary 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: We and our related persons can buy or sell for ourselves securities that we also recommend to you. Such transactions can include trading in securities in a manner inconsistent with the advice given to you. We have policies and procedures to monitor the potential conflicts disclosed above. We render only disinterested and impartial advice to clients and our goal is to comply with fiduciary obligations. We are responsible for recommending investments based on your investment objectives and risk tolerance. Please see Form ADV Part 2A (Brochure) Items 10 and 11 for more detailed information

A good, related question to ask your account executive:

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

For additional information of potential conflicts of interest, more information can be found at:

HOW DO YOUR FINANCIAL PROFESSIONALS MAKE MONEY?

Our consultants generate income solely from revenue earned from advisory fees.

For more information on how your financial advisor generates fees, please refer to LXG's ADV Part 2A for more information.

DO YOU OR YOUR FINANCIAL PROFESSIONALS HAVE LEGAL OR DISCIPLINARY HISTORY?

No. LXG does not have any disciplinary history.

No. None of LXG's Financial Advisors have disciplinary history.

However, you may research the history of both LXG and any of its Financial Advisors at the SEC's Investment Adviser Public Disclosure Website at: <https://adviserinfo.sec.gov/>

For additional information services or to request a copy of the relationship summary, please visit <https://adviserinfo.sec.gov/> or call (305) 456-7645.

A good, related question to ask your advisor:

"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?"

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**Exhibit A – Material Changes to Client Relationship
Summary**

Changes made to language to create additional transparency and clarity.