



Item 1 – Introduction: Is an investment advisory account right for you?

Fortis Private Wealth Advisors, LLC (“us,” “we,” or “the Adviser”) is registered with the Securities and Exchange Commission (“SEC”) as an investment adviser and we provide advisory services rather than brokerage services. We feel it is important for you to understand how advisory and brokerage services and fees differ in order to determine which type of account is right for you. There are free and simple tools available to research firms and financial professionals at www.investor.gov/CRS which also provides educational materials about investment advisers, broker-dealers and investing.

Item 2 – What investment services and advice can you provide me?

We offer investment advice and discretionary investment management services to investors through separately managed accounts. We customize the nature and scope of services based on your financial condition, risk tolerance and goals. After completing your investment profile, our investment strategy is implemented through a combination of investment products (our services are not limited to a specific type of investment or product), subject to your investment profile (and restrictions set by you, when applicable). If you open an advisory account with us, as part of our standard services we will monitor your investments on a continuous and ongoing basis. We impose a minimum account value of \$1,000,000 and reserve the right to reduce or waive this minimum. Accounts are typically reviewed by the CCO on a periodic basis or as needed due to market conditions or transactional activity, amongst other items.

Conversation Starters: 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 licenses, education, and other qualifications? What do these qualifications mean?

For more detailed information about our advisory services, please see Items 4 and 7 of our Brochure:
<https://adviserinfo.sec.gov/firm/summary/304494>.

Item 3 – What fees will I pay?

We typically receive a management fee, between 0.30% and 2.50% per annum charged quarterly in arrears. You may pay more or less fees than similar clients depending on the investment complexity and your particular circumstances, size, additional or differing levels of servicing or as otherwise agreed in the investment advisory agreement. All fees and/or total assets used for calculating our management fee may be negotiated or waived at our sole discretion. The management fee will be calculated as a
% of the average daily net asset value of your account during each calendar quarter. That sum shall in turn be divided by 365 days and multiplied by the number of days during the calendar quarter in order to obtain the average net asset value. The management fee will be pro-rated if you open or close the account at any time other than the beginning or end of a calendar quarter.

In addition to, and exclusive of, our fees disclosed above, you will also be charged brokerage commissions, transaction fees, custodian fees and charges, and other costs and expenses related to your investment account and securities transactions. You should also be aware that we may invest or recommend exchange traded funds, private funds, and other companies/investments that may assess a management fee to investors and, in certain cases, may charge administrative, servicing and/or other fees, including performance fees. Any fees paid to such companies, or their affiliates are separate and in addition to our advisory fees, which are disclosed in a fund’s prospectus. **You will pay fees and costs whether you make or lose money on your investments. Fees and**



Fortis Private Wealth Advisors, LLC
Form ADV Part 3 – CRS (Customer Relationship Summary)

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.

Conversation Starters: 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?

For more detailed information about our fees and costs, please see Item 5 of our Brochure:
<https://adviserinfo.sec.gov/firm/summary/304494>.

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. We may recommend you to affiliated or unaffiliated service providers for the purchase and sale of other services and/or investments. In such instances, we may receive commissions, fees and/or interest, exclusive of and in addition to Adviser's fees. There is a conflict of interest because we have a financial incentive to recommend these other products if the compensation is higher rather than based on your need. You are under no obligation to accept these services and or investments. We have adopted policies and procedures reasonably designed to appropriately prevent, limit or mitigate conflicts of interest that arise.

Conversation Starters: How may these conflicts of interest affect me, and how will you address them?

For more detailed information about our conflicts of interest, please see Items 5, 6, 10, 12, 14 of our Brochure: <https://adviserinfo.sec.gov/firm/summary/304494>.

How do your financial professionals make money? The financial professionals servicing your account(s) are compensated based on your assets managed, time and complexity required to meet your needs, and receive a portion of the revenue we earn. They may also receive compensation from affiliated or unaffiliated service providers for the recommendation and sale of insurance products or real estate investments/services.

Item 4 – Do you or your financial professionals have legal or disciplinary history?

No. Visit: <http://www.investor.gov/crs> for a free and simple search tool.

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

Item 5 – Additional Information

For additional information on our investment advisory services and request a copy of the relationship summary at (305) 416-9093 or click the link provided <https://adviserinfo.sec.gov/firm/summary/304494>. To report a problem to the SEC, visit Investor.gov or call the SEC's toll-free investor assistance line at (800) 732-0330.

Conversation Starters: 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?

An investment adviser representative will be assigned to your account. However, if you have a problem with your investments, investment account or a financial professional, contact the CCO, Leticia Santiago in writing at 6100 Blue Lagoon Drive, Suite 160. Miami, FL 33126 or (305) 416-9093, and your concerns will be addressed immediately.