

Impact Partnership Wealth, LLC
Form CRS Customer Relationship Summary May 2021

Introduction

Impact Partnership Wealth, LLC (“IPW”) is registered with the Securities and Exchange Commission (SEC) as a registered investment adviser firm. Brokerage and investment advisory services and fees differ and it is important for you to understand these differences. Free and simple tools are available to research firms and financial professionals at www.investor.gov/CRS, which also provides educational materials about broker-dealers, registered investment advisers, and investing.

What investment services and advice can you provide me?

Individual and Model Portfolio Management Services: IPW manages client investment portfolios on a discretionary or non-discretionary basis allocating client asset among various mutual funds, exchange-traded funds (“ETFs”) and debt and equity securities. When engaged on a discretionary basis, we will buy and sell investments in your account as appropriate without requiring your pre-approval on an ongoing basis until you notify us in writing to switch. You may impose reasonable restrictions. When engaged on a non-discretionary basis, you make the ultimate decision regarding the purchase or sale of investments. These accounts are monitored by IPW on a quarterly basis. **Selection and Monitoring of Third-Party Money Managers:** IPW selects certain Independent Managers (“Sub-Advisors”) to actively manage a portion of client assets. **Financial Planning Services:** IPW offers clients a broad range of services, which may include retirement, education, trust and estate, insurance and tax planning.

Our investment recommendations are not limited to any specific product or service.

For additional information, please see Items 4 and 7 of our Form ADV, 2A Brochure (Part 2A) available at: www.impactpartnershipwealth.com

Conversation Starters. Ask your financial professional...

- 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?

What fees will I pay?

IPW's individual and model portfolio management services are charged an annual fee between .50% - 1.65% based on the amount of assets under management. Clients are billed 30 days in arrears and fees are deducted from the client's account.. There is no minimum account requirement for this service. IPW charges clients on a fixed fee basis of up to \$2500 for providing financial planning services. This fee is a one-time fee and can be due at the start of the relationship.

Some fee arrangements create conflicts of interest described in more detail in our Form ADV, Part 2A. It is important to understand that the more assets held in a retail client's account, the more the client will pay in total fees. We therefore have an incentive to encourage a client to increase the assets in his/her account. There are other fees and costs related to our investment advisory services and investments in addition to the principal fees and costs listed above that you will pay directly or indirectly. You should understand that the fees discussed above are specific to what we charge and do not include certain charges imposed by third parties, such as custodial fees, exchange traded or mutual fund fees and expenses, brokerage fees and commissions, and other fees and taxes on brokerage accounts and securities transactions.

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 additional information, please see Item 5 of our Form ADV, 2A Brochure (Part 2A) available at: www.impactpartnershipwealth.com.

Conversation Starter. 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 providing recommendations as my broker-dealer or 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 with your interest because they can affect the recommendations and the investment advice we provide to you.

For example, the more assets the client has in his/her account, the more we receive in fees. We therefore have an incentive to encourage a client to increase the assets in his/her account. In addition, our minimum account size is negotiable under certain circumstances and at our discretion. Should we agree to waive this minimum account size, we would receive less compensation for services provided. We, therefore, have a disincentive to waive this minimum.

Conversation Starter. Ask your financial professional...

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

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How does your financial professional(s) make money?

The firm's financial professionals receive a percentage of the fees charged to the client. IPW associated persons are insurance agents, registered representatives of a broker-dealer, and investment adviser representative at another registered investment adviser. Clients should be aware that the receipt of additional compensation by IPW creates a conflict of interest that may impair the objectivity of these individuals when making advisory recommendations. IPW endeavors at all times to put the interest of its clients first as part of our fiduciary duty as a registered investment adviser.

Do your financial professional(s) have legal or disciplinary history?

Yes. You can look up more information about us and our investment adviser representatives at <https://www.investor.gov/CRS>.

Conversation Starter. Ask your financial professional...

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

Additional Information

If you would like additional information or a copy of this disclosure or our Form ADV, Part 2A, please call (800)-380-5040.

Conversation Starter. 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?