

FORM CRS – CUSTOMER RELATIONSHIP SUMMARY

June 15, 2022

<p>Item 1. <u>Introduction</u></p>	<p>Liberty Wealth Advisors, LLC is registered with the Securities and Exchange Commission (SEC) as an investment adviser. 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 Investor.gov/CRS, which also provides educational materials about broker-dealers, investment advisers, and investing.</p>
<p>Item 2. <u>Relationships and Services</u></p>	<p>What investment services and advice can you provide me? We provide wealth planning, financial planning, consulting, and investment management services to individuals, high net worth individuals, trusts, estates, endowments, institutions, individual participants of retirement plans, pension and profit-sharing plans, charitable organizations, corporations and other businesses.</p> <p>Monitoring We review client accounts and positions on a continuous basis. Our Chief Investment Officer supervises the Portfolio Management staff conducting internal reviews of client accounts for adherence to a client’s Asset Allocation Strategies. A financial advisor will also review a client’s specific investment goals and objectives on a periodic basis and work with a client to align them with the client’s investment strategy.</p> <p>Investment Authority We typically have full discretion to decide the specific securities to trade, the quantity of such securities, and the timing of securities transactions for client accounts. Certain client-imposed conditions may limit our Discretionary Authority, such as when the client prohibits transactions in specific security types.</p> <p>Limited Investment Offering We reserve the right to advise clients on any type of investment that we deem appropriate based on the client’s stated goals and objectives. We may also provide advice on any type of investment held in a client’s portfolio at the inception of the advisory relationship or on any investment on which the client requests advice.</p> <p>Account Minimums and Other Requirements Generally, we require clients to maintain a Client Relationship size of \$750,000. Under certain circumstances, minimum account sizes may be negotiable.</p> <p>More information about our services can be found on Part 2 of our Form ADV, which is available at https://adviserinfo.sec.gov/firm/summary/107774.</p> <p>Conversation Starters. Ask your financial professional—</p> <ul style="list-style-type: none"> • 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?
<p>Item 3.a. <u>Fees, Costs, Conflicts, and Standard of Conduct</u></p>	<p>A. What fees will I pay? Fees are based on relationship size, level of service provided and the experience level of our professionals providing those services. For wealth planning services, we generally charge fees ranging from 0.89% to 1.25%, but on a case-by-case basis and at its discretion, Liberty Wealth Advisors[®] d/b/a Portfolio Solutions[®] may offer fee schedules for legacy or new clients which vary from those above. Minimum quarterly fees are charged based on the relationship size and level of service provided. More information about our firm’s fees are included in Part 2 of Form ADV: https://adviserinfo.sec.gov/firm/summary/107774.</p>

