

Form CRS (Client Relationship Summary)

June 30, 2020

McGee Wealth Management, Inc.

Item 1: Introduction.

McGee Wealth Management, Inc. ("MWM") 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.

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

As a registered investment adviser, the Firm offers financial planning and portfolio management services, on either a discretionary or non-discretionary basis. For our financial planning services, we will provide you with either a comprehensive or limited plan and, if requested by enrolling in one of our portfolio management programs, we will assist you with the execution of the financial plan. If you decide to utilize our portfolio management services, you can decide whether you will want us to manage your portfolio on a discretionary or a non-discretionary basis. If you choose our non-discretionary service, your financial professional can offer recommendations to buy, sell, or hold securities, but you will make the final investment decisions. If you desire to provide us with discretion, you shall authorize your financial professional to make investment decisions for your account based upon the investment objectives and financial guidelines previously agreed by you and your financial professional. Securities are offered through the Raymond James investment platform. Investment Advisor agents of McGee Wealth Management are also registered representatives of Raymond James Financial Services Inc. Member FINRA/SIPC.

Account Monitoring: We monitor the portfolios in our discretionary and non-discretionary accounts as part of our services quarterly.

Account Minimums: As set forth in the account agreement and in our Form ADV, a minimum of \$25,000.00 of assets under management is required. However, the account size may be negotiable under certain circumstances.

Limited Investment Offerings: We offer and make recommendations on proprietary and non-proprietary products. We do not offer or make recommendations on all products of any particular type; for example, we do not offer or make recommendations on all mutual funds, or make available all share classes of the offered mutual funds.

Additional Information: For additional information about our advisory services, please see our Form ADV, Part 2A brochure at https://files.adviserinfo.sec.gov/IAPD/Content/Common/crd_iapd_Brochure.aspx?BRCHR_VRSN_ID=615317

CONVERSATION STARTER

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?

Item 3A. What fees will I pay?

Our fees are based on a percentage of assets under management, hourly charges, fixed fees (not including subscription fees) or commissions. Generally, if you utilize our financial planning or consultation services to assist you with a comprehensive or a modular financial plan, you will be charged fees on either an hourly basis at an average rate of \$350 or on a fixed basis at an average cost of \$3000, as set forth in your agreement with our firm. If you utilize our portfolio management services, you will be charged quarterly fees in advance, based upon $\frac{1}{4}$ of our annual rate. Our AUM Fees are 1.25% up to \$1m, 1.0% = \$1m-\$5m, 0.85% = \$5m-\$10m, over \$10m is negotiable. Thus, the more assets there are in your account, the more you will pay in fees. Therefore, we may have an incentive to encourage you to increase assets in your account.

You should understand that the fees you pay to us do not include certain other fees, such as the fees associated with a custody account or a brokerage account are not included. Similarly, the fees you pay us are separate and distinct from the fees and expenses charged by mutual funds or exchange traded funds (as described in each funds' prospectus) to their shareholders. Unless you participate in a wrap fee program, you will incur transaction charges and/or brokerage fees when purchasing or selling securities. These charges and fees are typically imposed by the broker-dealer or the custodian through whom your transactions are executed. Similarly, you should understand that all fees, expenses and charges associated with the purchase or sale of mutual funds shares are not included in the above fees, but are fully disclosed in the mutual fund prospectus. Additional Information. You will pay fees and costs whether you lose money on your investments. Fees and costs will reduce any amount of money you make on investments over time. Please make sure you understand what fees and costs you are paying. Please see Form ADV, Part 2A Brochure (Item 5 of Part 2A).

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 towards fees and costs, and how much will be invested for me?

Item 3B. 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 provide you with a recommendation, we must 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 about these conflicts because they can affect the recommendations we provide you. Here are some examples to help you understand what this means. You can implement securities transactions with certain persons associated with our firm as Registered Representatives of Raymond James Financial Services, Inc. (RJFS) Member FINRA/SIPC. McGee Wealth Management advisors are fee-based and primarily charge for investment management based on a percentage of assets under management. However, advisors have the ability to offer commission-based products that RJFS may charge brokerage commissions. You are encouraged to learn more about RJFS by reviewing RJFS's relationship summary and having a discussion with your financial professional.

Our custodian or some mutual fund companies have helped us defer expenses for client events. Our custodian also provides us with services such as access to conferences, technology, marketing, research and business consulting, some of which benefit us rather than our clients. These benefits create a conflict of interest with our clients because we could be using our custodian or specific mutual funds for our benefit rather than for our clients' benefit. We continue to monitor these conflicts of interests to ensure our clients' needs are satisfied. This summary does not identify all of our conflicts of interest, or all material facts about the conflicts of interest listed. For additional information about these and other conflicts of interest, please see our Form ADV, Part 2A brochure and other applicable documents.

CONVERSATION STARTER

Ask your financial professional:

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

Item 3C. How do your financial professionals make money?

Our financial professionals are paid salaries [and receive bonuses based upon the profitability of the Firm and the performance of their responsibilities]. In addition, they are compensated with commissions based on the type of product sold. This presents a conflict of interest because those individuals can recommend the purchase of insurance and brokerage products where they would receive commissions or other compensation.

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

No. Visit [Investor.gov/CRS](https://www.investor.gov/crs) for a free and simple search tool to research us and our financial professionals.

CONVERSATION STARTER

Ask your financial professional:

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

Item 5. Additional Information

Additional Information: This Form CRS is an SEC-mandated summary disclosure on certain important topics about McGee Wealth Management. Statements in this Form CRS requiring that we act in your best interest when making recommendations reflect our obligations under the SEC's Regulation Best Interest after the rule's compliance date. The information in this Form CRS is subject to the more complete terms and conditions of our agreements and disclosures, and does not create or modify any agreement, relationship or obligation you have with us. For additional information about our services, please visit our website at <https://www.mcgeewm.com/>

If you would like additional information or a copy of this Form CRS, please call us at 503.597.222.

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