

Bulwark Capital Corporation
October 15, 2025

FORM CRS

Bulwark Capital Corporation is registered with the Securities and Exchange Commission as an investment adviser and, as such, we provide advisory services rather than brokerage services. Brokerage and investment advisory services and fees differ and it is important for you, our client, to understand the differences. Additionally, free and simple tools are available to research firms and financial professionals at [Investor.gov/CRS](https://investor.gov/CRS), which also provides educational materials about broker-dealers, investment advisers, and investing. This document is a summary of the services and fees we offer to "retail" investors, which are natural persons who seek or receive services primarily for personal, family, or household purposes.

Conversation Starters: It is important for you to understand your account, its terms and limitations, and the relationship you have with us. Each section in this document offers a series of "Key Questions to Ask Your Financial Professional" that offers prompts you may want to ask to further discuss our relationship, our processes and the fees charged for our services.

What investment services and advice can you provide me?

We offer the following investment advisory services to retail investors: **Portfolio Management Services, Financial Plan Modeling and Advisory Consulting Services.**

- ***Account Monitoring:*** If you open an investment account with our firm, as part of our standard service we will monitor your investments on a continuous basis and will make changes in response to market opportunities at our discretion.
- ***Investment Authority:*** We manage investment accounts on a **discretionary** basis whereby **we will decide** which investments to buy or sell for your account.
- ***Investment Offerings:*** We provide advice on various types of investments. Our services are not limited to a specific type of investment or product.
- ***Account Minimums and Requirements:*** In general, we do not require a minimum dollar amount to open and maintain an advisory account; however, we have the right to terminate your account if it falls below a minimum size which, in our sole opinion, is too small to manage effectively.

Detailed information regarding our services, fees and other disclosures can be found in our Form ADV Part 2A Items 4, 7, and 8 by clicking this link <https://adviserinfo.sec.gov/firm/brochure/139266>.

Key Questions to 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?**

What fees will I pay?

The following summarizes the principal fees and costs associated with engaging our firm for investment advisory services.

- **Asset Based Fees** - Payable quarterly in advance. Since the fees we receive are asset-based (i.e. based on the value of your account), we are certainly incentivized to increase your account value but are also incentivized to manage risk to match your investment objective and thus maintain your confidence in us. We bill on assets held with and valued by the custodian.
- **Hourly Fees** - Payable In arrears (i.e., after services are rendered);
- **Fixed Fees** - Payable In arrears (i.e., after services are rendered).

In addition to our principal fees and costs, there are other common fees and costs applicable to our clients that include:

- Custodian fees;
- Account maintenance fees;
- Fees related to mutual funds and exchange-traded funds;
- Transaction charges when purchasing or selling securities; and

- Other product-level fees associated with your investments

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 detailed information, refer to our Form ADV Part 2A, Items 5 and 6 by clicking this link <https://adviserinfo.sec.gov/firm/brochure/139266>.

Key Questions to 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 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 hope to have long-term relationships with our clients. This may result with us being more conservative with your investments than you would prefer. We are certainly willing to increase the level of risk if we have assumed that your risk tolerance is lower than it actually is. The reverse can be true as well and communication on this topic through time is important.

Key Questions to Ask Your Financial Professional

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

Refer to our Form ADV Part 2A by clicking this link <https://adviserinfo.sec.gov/firm/brochure/139266> to help you understand what conflicts exist.

How do your financial professionals make money?

The financial professionals servicing your account(s) are compensated in the form of a salary, and for the owner distributions. We do not currently pay bonuses but reserve the right to do that in the future. Bonuses will be paid based on employee performance.

Do you or your financial professionals have legal or disciplinary history?

No, our firm and our financial professionals currently do not have any legal or disciplinary history to disclose. Visit Investor.gov/CRS for a free and simple research tool.

Key Questions to Ask Your Financial Professional

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

You can find additional information about your investment advisory services and request a copy of the relationship summary at 703-740-6870 or click the link provided <https://adviserinfo.sec.gov/firm/brochure/139266>.

Key Questions to 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?**

Bulwark Capital Corporation
October 15, 2025

Exhibit to Form CRS

Bulwark Capital Corporation is required to update its Form CRS when information in the Form CRS becomes materially inaccurate. This Exhibit summarizes the following material changes to the firm's Form CRS, implemented on October 15, 2025.

- We have amended our Form CRS to disclose that we offer a complimentary financial plan modeling service using a third-party financial planning software.