DUELL FINANCIAL STRATEGIES, LLC - RELATIONSHIP SUMMARY

Introduction

Duell Financial Strategies, LLC is registered with the Securities and Exchange Commission as an investment adviser. Brokerage and investment advisory services and fees differ, and it is important for retail investors to understand the 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.

Relationships and Services

What investment services and advice can you provide me?

We offer investment advisory services to retail investors.

We offer ongoing portfolio management services based on the individual goals, objectives, time horizon, and risk tolerance of each client. We will recommend that clients use the services of specific programs offered through a third-party investment adviser ("sub-adviser") to manage the portfolio. We will have discretionary authority to choose from portfolios offered by the sub-adviser.

We also occasionally provide no-cost seminars/workshops that may cover financial planning, retirement planning, estate planning, college planning and charitable planning.

Additional Information:

You can find more detailed information about the services we offer in Item 4 of our ADV Part 2A.

Conversation Starters:

1. "Given my financial situation, should I choose an investment advisory service? Why or why not?"
2. "How will you choose investments to recommend to me?"
3. "What is your relevant experience, including your licenses, education and other qualifications? What do these qualifications mean?"

Fees, Costs, Conflicts, and Standard of Conduct

What fees will I pay?

Our portfolio management fee is based on a percentage of assets under management in the client's account. The fee may be calculated monthly or quarterly, in arrears or advance depending on the selected sub-adviser. The maximum annual management fee is 2.00%. Our portion of the fee typically ranges from 0.85% to 1.60%. The fee may be negotiable.

Please also see items 4, 5, 6, 7 & 8 in our ADV Part 2A (firm brochure) for our fee schedule and other information. https://adviserinfo.sec.gov/firm/summary/140283

Our management fees are exclusive of account maintenance fees, brokerage commissions, transaction fees, and other custodian related costs and expenses. Mutual funds and exchange traded funds charge internal fees that are separate from our management fee.

Additional Information:

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. You can find more detailed information about our fees and costs in Item 5 of our Firm Brochure.

Conversation Starter:

"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 to you. Here are some examples to help you understand what this means:

a) Our owners or associates may be independent insurance agents and may recommend these services to clients. This other activity pays them commissions that are separate from our fees and give our owners a financial incentive to recommend and sell insurance products to our clients.

b) When we recommend that you rollover a retirement account for us to manage, this creates a conflict of financial incentive because we charge a fee for our services.

Conversation Starter:

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

Additional Information:

You can find more detailed information about our conflicts of interest in Item 10 of our Firm Brochure.

https://adviserinfo.sec.gov/firm/summary/298014

How do your financial professionals make money?

Our financial professionals receive a salary for their services. Bonuses are paid from time to time based on our owners' discretion.

Disciplinary History

Do you or your financial professionals have legal or disciplinary history? No

Additional Information:

Visit Investor.gov/CRS for a free and simple search tool to research you and your financial professionals.

Conversation Starter:

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

Additional Information

You can find additional information about our advisory services and request a copy of our relationship summary here:

Address: 4190 Boardwalk Ct., Appleton, WI 54914

Telephone: (920) 832-3720

Website: https://duellstrategies.com/

Conversation Starter: "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?"

Material Changes: