Morton Wealth Advisors June 2020

Form CRS – Client Relationship Summary

INTRODUCTION

Our firm, MWA, is an investment advisor registered with the Securities and Exchange Commission. The services offered and fees charged by an investment advisor differ from those of broker-dealers and it is important that you understand the differences. There are free and simple tools available to research firms and financial professionals at www.investor.gov/CRS which provides educational materials about advisors, broker-dealers and investing.

WHAT INVESTING SERVICES AND ADVICE CAN YOU PROVIDE ME?

We offer investment advisory services and asset management to clients. If you open an advisory account with our firm, we will work with you to understand your current financial situation, existing assets and resources, investment goals and risk tolerance. Based on what we learn, we will design and implement an investment strategy, monitor your investments and make changes to your asset mix as needed. We will help you meet your investment objectives. We will advise you on a regular basis and contact you at least semi-annually to discuss your portfolio and your situation.

We will manage your account on a discretionary basis. After you sign our advisory agreement, we are allowed to buy and sell investments in your account without asking you in advance. Any limitations must be described in the signed advisory agreement. We will have discretion until the advisory agreement is terminated by you or us.

We do not restrict our advice to limited types of products or investments.

Our firm requires a minimum account balance of $250,000 to open an account.

Financial Planning and Consulting is included in our advisory services for no additional fee.
Additional information about our advisory services is in Item 4 of our Firm Brochure, which is available online at *https://files.adviserinfo.sec.gov/IAPD/Content/Common/crd_iapd_Brochure.aspx?BRCHR_VRSN_ID=603559*

WHAT FEES WILL I PAY

You will be charged an ongoing quarterly fee based on the value of the investments in your account. Our advisory fees range from .5% to 1.5%. Since our fee is based on a percentage of assets in your account(s) we have an incentive to increase the assets in your advisory account.

Our fees will be automatically deducted from your advisory account.

The broker-dealer that holds your account(s) may charge you a transaction fee when we buy or sell an investment for you. These broker-dealer fees are in addition to our advisory fee. These fees may be waived with e-delivery and higher asset levels.

You may also have fees associated with certain investments. Mutual funds, index funds, ETF's and annuities can charge fees that reduce the value of your accounts.

You will have fees and costs whether you make or lose money on your investments. Please take the time to understand what fees you are paying.

Additional information about our fees can be found in Item 5 our Firm Brochure available online at https://files.adviserinfo.sec.gov/IAPD/Content/Common/crd_iapd_Brochure.aspx?BRCHR_VRSN_ID=603559

WHAT ARE THE LEGAL OBLIGATIONS TO ME WHEN ACTING AS MY INVESTMENT ADVISOR? 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. Below are some examples to help you understand what this means.

MWA permits its advisors to engage, on a limited basis, in personal securities transactions. As a result, associates may purchase or sell the same or similar securities at the same time that we place transactions for you. To avoid potential conflicts of interest involving personal trades, MWA has adopted formal insider trading and personal securities transactions policies and procedures.

MWA advisors include a licensed insurance agent who can sell insurance products for a commission.

HOW DO YOUR FINANCIAL PROFESSIONALS MAKE MONEY?

Our financial professionals are compensated based on the revenue our firm earns from advisory services and the amount of client assets they service.

DO YOU OR YOUR PORFESSIONALS HAVE LEGAL OR DISCIPLINARY HISTORY?

No, Visit Investor.gov/CRS for a free and simple search tool to research our firm and our financial professionals.

ADDITIONAL INFORMATION

You can find additional information about our firm's investment advisory services on the SEC's website at www.adviserinfo.sec.gov by searching CRD# 142912. You may also contact our firm at 781-263-1686 to request a copy of this relationship summary and other up-to-date information.

Additional key questions to ask:

- Help me understand how these fees and costs may 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?
- How might your conflicts of interest affect me, and how will you address them?
- 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?