

## Form CRS Disclosure – TAYLOR WEALTH MANAGEMENT PARTNERS

December 31, 2020

TAYLOR WEALTH MANAGEMENT PARTNERS, LLC. (TWMP) is registered with the Securities and Exchange Commission (SEC) as an Investment Advisor.

Brokerage and investment advisory services and fees differ, and that 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](https://www.investor.gov/CRS), which also provides educational materials about broker-dealers, investment advisers, and investing.

### ***What investment services and advice can you provide me?***

We offer to retail investors investment advisory services. TWMP provides financial planning, investment counseling and investment management services. Our clients are individuals, (including various types of IRAs), families and trusts; private ERISA plans; and not-for-profit organizations. We invest primarily in publicly traded stocks and bonds, and from time to time invest in exchange traded funds (etf), options and fixed income. We do not buy mutual funds. Depending on how much money you have to invest and what your investment objectives are, we can help answer your questions and could suggest one of our four investment strategies ranging from conservative to aggressive to meet your investment goals.

TWMP PROVIDES CONTINUOUS MANAGEMENT AND SUPERVISION OF ASSETS, INCLUDING SECURITIES PORTFOLIOS, ON A FULLY DISCRETIONARY BASIS. WE OFFER FOUR TYPES OF PORTFOLIOS IN LONG ONLY SEPARATE ACCOUNTS: CONSERVATIVE HIGH YIELD, BALANCED, GROWTH AND INCOME, AND AGGRESSIVE. WE DO NOT HAVE A MINIMUM ACCOUNT SIZE, BUT ENCOURAGE CLIENT RELATIONSHIPS TO START WITH AT LEAST \$250,000.

*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?***

TWMP'S Investment Management (IM) Fee will be charged at a rate of 1% on the first \$5 million under our management and then at 0.75% above \$5 million per annum, billed quarterly, based on the prior quarter end market value. For the ETF product TWMP's IM Fee will be charged at a rate of 0.75% for the first \$5 million under our management and then at 0.5625% above \$5 million per annum billed quarterly based on the prior quarter end market value. As we are not a custodian, you will be charged a Custodial Fee at the rate set forth in the custodian's agreement. In addition to IM and custody fees, you will also most likely pay either a trading commission to a broker or a small management fee for an ETF. TWMP does not receive compensation for the purchase or sale of any securities. Financial planning fees are charged on an hourly, project, or monthly retainer basis.

*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.*

TWMP'S IM FEES ARE 1% UP TO \$5 MILLION UNDER OUR MANAGEMENT AND THEN AT 0.75% ABOVE \$5 MILLION PER ANNUM. NEWLY CONTRACTED NOT-FOR-PROFIT INSTITUTIONAL CLIENTS RECEIVE 0.25% DISCOUNT PER ANNUM. ETF PRODUCT FEES ARE 0.75% UP TO \$5 MILLION UNDER OUR MANAGEMENT AND THEN AT 0.5625% ABOVE \$5 MILLION PER ANNUM. FEES CAN BE PAID OUT OF THE CLIENT'S ACCOUNT OR DIRECTLY BY CLIENT. FEES ARE NON-NEGOTIABLE, EXCEPT UNDER UNUSUAL CIRCUMSTANCES. THE CUSTODIAN WILL CHARGE THE CLIENT'S ACCOUNT DIRECTLY FOR CUSTODIAN SERVICES. TWMP DOES NOT RECEIVE COMPENSATION FOR THE PURCHASE OR SALE OF ANY SECURITIES. NONE OF OUR EMPLOYEES ACCEPTS COMPENSATION OUTSIDE OF THE FIRM.

*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 are a fiduciary and understand that that means the client's interests always come first. If your account increases in value, we make more money than when it declines in value. Therefore, we believe the fee structure is a fair incentive for both you, the client, and ourselves, the manager. Nevertheless, you should understand under this fee arrangement, which is typical in our industry, that increasing your assets under our management will increase our fees.

AS TWMP IS NOT A BROKER-DEALER, WE DO NOT RECEIVE COMPENSATION FOR THE PURCHASE OR SALE OF ANY SECURITIES.

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

### ***How do your financial professionals make money?***

Our investment professionals are paid a salary plus bonus.

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

No. To learn more you can visit [Investor.gov/CRS](http://Investor.gov/CRS) for a free and simple search tool to research our firm (TWMP) and our financial professionals.

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

To obtain additional information on TWMP or to obtain a copy of our CRS statement, please contact us by email at [info@taylorwealthpartners.com](mailto:info@taylorwealthpartners.com) or by telephone at (617) 357-4600. Additional information may also be found on our website at [www.taylorwealthpartners.com](http://www.taylorwealthpartners.com).

*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?*