

Olympus Wealth Management, LLC
Form CRS Customer Relationship Summary
March 28, 2023

Olympus Wealth Management, LLC. (“OWM”) is an investment adviser registered with the U.S. Securities and Exchange Commission (“SEC”). Fees for brokerage and investment advisory services differ and it is important for you to understand those differences. Free and simple tools are available for you to research us, other firms and financial professionals at [Investor.gov/CRS](https://www.investor.gov/CRS). At this site, you may also find important educational materials about broker-dealers, investment advisers and investing.

What investment services and advice can you provide me?

Ask your financial professional the following questions:

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?

We offer investment advisory services to investors, like you. Our services include Investment Management & Financial Planning (“Wealth Management”) services, Multi-Family Office (“MFO”) services, and Private Investment Consulting Plan (“PIC”) services. Our approach to Financial Planning involves gathering information, analyzing scenarios, and tailoring a plan to your needs. We then help implement and monitor your plan. For Investment Management clients, we construct portfolios with investment vehicles that may include mutual funds, exchange-traded funds, and/or separately managed accounts. We also utilize other investment vehicles when appropriate. Within our MFO Services we provide or coordinate a range of services which can include consulting for your entire balance sheet (not just your liquid investments), complex wealth transfer strategies, bookkeeping, and bill pay services. Within our PIC Services we research and typically recommend unaffiliated private funds to clients. As part of our investment management services, we monitor your account on an ongoing basis. We periodically re-

balance accounts consistent with the account’s investment objectives and restrictions; implement investment strategies; and furnish reports concerning account activity, strategy, and performance. We manage accounts on a discretionary or non-discretionary basis. Discretionary basis means our firm has authority to determine the type of securities bought and sold, the dollar amounts of the securities to be bought and sold and whether a client’s transaction should be combined with those of other clients and traded as a “block” without consulting you first. We maintain this discretion until it is revoked (*e.g.*, by termination). Non-discretionary basis means you make the ultimate decision regarding the purchase or sale of investments. Agreements can be terminated at any time by either party by providing written notice.

More detailed information about our services and advice, along with applicable conflicts can be found in Items, 4, 7, and 8 of our Form ADV Part 2A disclosure brochure. For a copy, click [here](#) or contact us at (801) 449-9600.

What fees will I pay?

Our annual fees for Wealth Management services are 1% for the first \$5 million, 0.70% for the next \$5 million, and 0.35% for the next \$10 million or more in managed assets. Our fee is negotiable, can differ from what is stated above, and is outlined in your wealth management agreement. Our fee is billed on a pro-rata basis, monthly in arrears, based on the market value of your managed assets on the last day of the prior month. To determine the amount of managed assets for billing, we aggregate the accounts for any related persons (*i.e.*, spouse and dependent children) living in your household. Additional related accounts will be considered for inclusion, if requested by you. We also prorate fees for cash flows (*i.e.*, additions and/or withdrawals) during a month that are 10% or more of the month end portfolio value. When calculating our fee, the total asset value includes cash/equivalents and any assets purchased using margin. The latter creates a conflict of interest since this can result in our fee being higher.

Our MFO services are provided for a negotiated flat fee or an asset-based percentage fee for these services. The fee charged is based on the scope and complexity of our engagement and outlined in your wealth management agreement. For PIC services where we perform private investment consulting, we charge an annual percentage fee, which is negotiated and based on the asset value of the private investments we consult on. As fees are paid monthly in arrears, there are no pre-paid

fees subject to refund. Upon termination, any fees that are earned by us but not yet paid will be immediately due and payable.

You are responsible for paying additional fees and costs to third parties in connection with your account, including but not limited to: custodial fees, mutual fund related fees, wire fees, and any other transactional or product level fees. 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.

Ask one of our financial professionals the following questions:

Help me understand how these fees and costs might affect my investments. If I give you \$1,000,000 to invest, how much will go to fees and costs, and how much will be invested for me?

More detailed information about our fees and other costs associated with investing, along with applicable conflicts can be found in Items 5, 10, and 14 of our Form ADV Part 2A disclosure brochure. For a copy, click [here](#) or contact us at (801) 449-9600.

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 a fiduciary duty 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. Due to the compensation, we earn, a conflict with your interests is created. For example, because we earn more as the value of the account increases, we can be motivated to place your assets in a more aggressive or risky manner in order to inflate the portfolio value and earn higher compensation. To mitigate this conflict, we have adopted certain supervisory policies and procedures, as well as our Code of Ethics, which sets forth the professional and fiduciary standards that associated persons must follow. You should understand and ask us about this conflict because it can affect the investment advice we provide you. We have no outside financial industry activities or financial industry affiliations.

Ask your financial professional:

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

More detailed information about our conflicts of interest can be found in Items 4, 5, 7, 11, and 12 of our Form ADV Part 2A disclosure brochure. For a copy, click [here](#) or contact us at (801) 449-9600.

How do your financial professionals make money?

Firm Principals Scott Bird, Matthew Krull, and Scott Poelman as owners in the firm, receive a base salary and share in earnings of the firm. Other Investment Advisor Representatives of the Firm earn a base salary and share in the company revenue of the firm. *Additional information about compensation arrangements for our financial professionals and related conflicts of interest are outlined in each professional's Form ADV Part 2B, which can be obtained by contacting us at (801) 449-9600.*

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

No. Please go to www.Investor.gov/CRS for a free and simple search tool to research us and our financial professionals.

Additional Information

Additional information and a copy of this Form CRS can be found at www.adviserinfo.sec.gov by searching "Olympus Wealth Management" or by contacting us at 6985 Union Park Center, Suite 435 Cottonwood Heights, UT 84047 or by phone at (801) 449-9600.

Ask your financial professional:

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

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?

EXHIBIT A
FORM CRS CLIENT RELATIONSHIP SUMMARY
OLYMPUS WEALTH MANAGEMENT, LLC

March 28, 2023

SUMMARY OF CHANGES

We added language surrounding our Private Investment Consulting Plan services to include how we bill for the same.