

Family Wealth Partners, LLC (IARD #304935)
Client Relationship Summary as of April 2026

Item 1. Introduction

Family Wealth Partners, LLC (“Family Wealth Partners”) is registered with the Securities and Exchange Commission (“SEC”). Our investment advisory services and fees can differ depending on certain programs offered and it is important for you to understand the 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 investment advisers and investing.

Item 2. Relationships and Services/ What investment services and advice can you provide me?

We offer discretionary investment advisory services to our clients for a fee. Family Wealth Partners provides investment management services primarily on a discretionary basis according to the investment objectives of the client and in accordance with the terms and conditions of the Investment Advisory Agreement between the Family Wealth Partners and the client. Based upon the client’s stated investment objectives, Family Wealth’s investment management utilizes portfolio models that focus on providing investment returns consistent with clients’ investment goals and objectives. Family Wealth Partners will invest client’s accounts in certain percentages amongst numerous asset classes (e.g. stocks, corporate and government bonds and ETFs) in order to maximize client’s investment returns while achieving lower volatility within pre-determined risk parameters.

The investment philosophy, process, substantial education, and financial planning help our clients understand and stick with the plan personally created for them. We monitor accounts on an ongoing basis and generally only trade when Family Wealth Partners deems it appropriate given our clients’ investment objectives and risk parameters. Family Wealth Partners does not maintain a minimum account size threshold.

For additional information, please see our ADV Part 2A Firm Brochure – Items 4,7,8, and 13:
[FAMILY WEALTH PARTNERS LLC - Investment Adviser Firm](#)

You may also wish to ask us:

- **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?**

Item 3. Fees Costs, Conflicts, and Standard of Conduct/What fees will I pay?

We bill most clients an ongoing asset-based fee, charged monthly in arrears. These fees are based upon the amount of assets under management and fall within a range of 1.00% to 1.50% (annually) on assets under management. You may incur transaction costs and custody fees in addition to our management fee. In the event an Independent Manager is selected, their fee will be in addition to our management fee. You may also pay the custodian for things like wire transfers, account transfers, account closings, etc. Some investments, such as mutual funds and ETFs, impose additional fees that will reduce the value of your investments over time. In very limited situations, Family Wealth Partners may charge an hourly fee for financial planning services. The hourly rate is \$300. More information is available in Item 5 of our Firm Brochure.

You will pay fees and costs whether you make or lose money on your investments, and these will reduce any amount of money you might make over time. Please make sure you understand what fees and costs you are paying.

You may also wish to ask us:

- **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 how much will be invested for me?**

For additional information, please see our ADV Part 2A Firm Brochure – Items 4,5,
[FAMILY WEALTH PARTNERS LLC - Investment Adviser Firm](#)

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 impact the objectivity of the investment advice we provide you.

Family Wealth Partners earns more fees as your account size increases. As a result, conflicts will arise if we recommend you to increase our assets under management, including retirement plan account rollovers to an IRA in which we manage. In addition, our financial planning may include a recommendation that you need investment management services. Certain representatives of Family Wealth Partners maintain insurance and brokerage licenses and may earn additional fees on insurance and securities products/annuities purchased by its clients. In these situations, Family Wealth's Supervised Persons disclose this additional compensation prior to or at the time of such purchase

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You may also wish to ask us:

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

How do your financial professionals make money?

Our financial professionals are compensated based on the amount of client assets they service and the resulting fee revenue paid by the client. Because we are generally compensated based on assets under management, this compensation arrangement presents a conflict of interest, as financial professionals are incentivized to increase client assets under our management. The client should discuss their financial professional's compensation directly with their financial professional.

Item 4. Disciplinary History/Do you or your financial professionals have legal or disciplinary history?

No. Neither Family Wealth Partners nor any of its financial professionals have any legal or disciplinary history to disclose. Please visit Investor.gov/CRS for free and simple search tool to research Family Wealth Partners and its financial professionals.

You may also wish to ask us:

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

Item 5. Additional Information

You may obtain additional information about Family Wealth Partners including our most recent Client Relationship Summary form by visiting [Home | Family Wealth NJ](#) or calling us at (856) 341-6562.

You may also wish to ask us:

- **Who is my primary contact person? Whom can I talk to if I have concerns about how this person is treating me?**