

VisionX Wealth Partners, LLC, is registered with the United States Securities and Exchange Commission as a Registered Investment Adviser. Brokerage and investment advisory services and fees differ, and it is important for the retail investor 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.

What investment services and advice can you provide to me?

We provide Wealth Management Services, Financial Planning Services, Qualified Retirement Plan Program Services and offer referrals to third parties or co-advisors. Our Wealth Management Services are offered as wrap accounts and non-wrap accounts. Wealth Management accounts and those referred to third parties or co-advisors are reviewed by Tanner Utley no less than quarterly. Financial plans generally conclude upon delivery of the financial planning document and therefore plans are not reviewed on a regular basis. Market conditions, changes in your account or circumstances will trigger a review of accounts.

We request discretion to buy and sell securities in your account without requesting your consent first. Our discretion does not include the ability to select the broker/dealers that execute your transactions. If you opt not to give us discretion, you will make the ultimate decision regarding the purchase and sale of every investment.

Our minimum account value for clients who work with us is \$100,000. Additional information concerning our services is available in our Form ADV Part 2A, in particular Items 4 and 7, which is available here: <https://adviserinfo.sec.gov/firm/summary/333559>

Ask your Financial Advisor:

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

What fees will I pay?

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.

Our asset management services are offered through a wrap program or a non-wrap program. In a wrap fee program, your fee will include most transaction costs and fees to your custodian and may be higher than the asset-based fee you would pay in a non-wrap program. Most of our accounts are offered through the Wrap Fee Program. For our asset management services, we charge a percentage of assets under management, paid quarterly in arrears, which ranges from 0.00% to 1.65%. Our complete fee schedule is listed in our Form ADV Part 2, Item 5; or the Form ADV Part 2, Appendix 1, Item 4 for the wrap fee program.

The more assets there are in your account, the more you will pay in fees. Therefore, we have an incentive to encourage you to increase assets in your account.

There are other fees you may pay, including separate transaction fees (**for non-wrap accounts**), fund management fees, or fees charged by the custodian of your assets. Those fees are detailed in offering documents or prospectuses for each product you purchase or in your custodial agreement. If you purchase insurance, you may also pay a commission, and the insurance product may have other fees and expenses that you should consider carefully.

For Financial Planning Clients **ONLY** (clients who only want financial planning services, not asset management and therefore are not included in our wrap fee program) we charge an hourly rate of \$200 per hour.

For more information about our services and their associated fees and costs, you should review our Form ADV Part 2A, specifically Item 5, available here: <https://adviserinfo.sec.gov/firm/summary/333559>

Ask your Financial Advisor:

- **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 is an example to help you understand what this means:

Associated persons may buy or sell for their own accounts the same securities recommended to you. As this creates a conflict of interest, associated persons seek to ensure that they do not personally benefit from the short-term market effects of their recommendations to you and we monitor their personal trading.

Ask your Financial Advisor:

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

For more detailed information about our conflicts of interest, please review our Form ADV Part 2A, available here: <https://adviserinfo.sec.gov/firm/summary/333559>

How do your financial professionals make money?

Our financial professional is paid a salary and the profits of the firm are distributed to him as an owner. The profitability of our business is largely determined by our assets under management, and therefore our financial professionals have an incentive to grow our assets under management.

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

No You should visit Investor.gov/CRS for a free and simple search tool to research us and our financial professionals.

Ask your Financial Advisor:

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

You may request up-to-date and more complete information, including a copy of this Customer Relationship Summary or our Form ADV Part 2 by calling us at 402-558-7774.

Ask your Financial Advisor:

- **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?**