



INTRODUCTION

Our firm, Basecamp Wealth Advisors, LLC, is an investment adviser registered with the Securities and Exchange Commission. We feel that it is important for you to understand how advisory and brokerage services and fees differ in order to determine which type of account is right for you. There are free and simple tools available to research firms and financial professionals at www.investor.gov/CRS, which also provides educational materials about investment advisers, broker-dealers, and investing.

WHAT INVESTMENT SERVICES AND ADVICE CAN YOU PROVIDE ME?

We are a Registered Investment Advisor that offers Wealth & Investment Management Services to clients on a discretionary basis. If you open an advisory account with our firm, we'll meet with you to understand your current financial situation, existing resources, objectives, and risk tolerance. Based on what we learn, we'll recommend a portfolio of investments that may include exchange-traded funds ("ETFs"), mutual funds, and accounts with third-party managers. In addition, we may recommend investments in alternative investments such as hedge funds and private markets. We generally meet with clients quarterly, but no less frequently than annually, to review their investments. Reviews occur more frequently when there are changes to your circumstances, needs, or goals.

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

Our firm requires a minimum household account balance of \$5,000,000 to open and maintain an account with us, although we may waive that minimum from time to time at our firm's sole discretion.

Financial planning & consulting services are included in our services for no additional fee.

Additional information about our advisory services is in Items 4 & 7 of our Firm Brochure which is available online at <https://adviserinfo.sec.gov/firm/summary/334018>.

Questions 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 those qualifications mean?

WHAT FEES WILL I PAY?

If you receive Wealth & Investment Management Services, you will pay us an agreed-upon annual fixed fee in quarterly installments based upon the scope and complexity of the services you receive, including special projects. If you receive Investment Management services, our maximum annual fee shall not exceed 0.75%. The more assets you have in your advisory account, the more you will pay us. We, therefore, have an incentive to increase the assets in your advisory account in order to increase our fees. Our fees vary and are negotiable. Our firm's fees will be automatically deducted from your advisory account, which will reduce the value of your advisory account. In rare cases, we will agree to send you invoices rather than automatically deduct our firm's fees from your advisory account.

The custodian holding your assets may charge you a transaction fee when we buy or sell an investment. The custodian's transaction fees are in addition to our firm's fees.

You may also pay charges imposed by the custodian holding your accounts for certain investments and maintaining your account. Some investments, such as mutual funds, index funds, and exchange-traded funds, charge additional fees that will reduce the value of your investments over time.

In certain cases, we select third-party money managers, sub-advisers, and/or separate account managers to assist us with managing your account. If selected, they will charge you a fee, which will be described to you in their Form ADV and/or agreement.



Whether you make or lose money on your investments, you will pay fees and costs. Fees and costs will reduce any amount of money you make on your investments over time. Please make sure you understand the fees and costs you are paying.

Additional information about our fees is in Item 5 of our Firm Brochure which is available online at <https://adviserinfo.sec.gov/firm/summary/334018>.

Questions to Ask Us:

- 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?

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:

Since our fees are earned based on the assets that we manage for you, we have an incentive to increase the amount of assets that we manage for you.

Additional information about our conflicts of interest is in Item 10 of our Firm Brochure which is available online at <https://adviserinfo.sec.gov/firm/summary/334018>.

Questions 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 revenue our firm earns from their advisory services or recommendations, the amount of client assets they service, and the time and complexity required to meet a client's needs. In addition, our firm receives transition assistance benefits from our recommended custodian to assist with ACAT fees and other transition costs.

DO YOU OR YOUR FINANCIAL PROFESSIONALS HAVE LEGAL OR DISCIPLINARY HISTORY?

No, our firm and financial professionals do not have any legal and disciplinary history to disclose. Visit Investor.gov/CRS for a free and simple search tool to research our firm and our financial professionals.

Questions to Ask Us:

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

ADDITIONAL INFORMATION

You can find additional information about our firm's investment advisory services on SEC's website at www.adviserinfo.sec.gov by searching CRD #334018. You may also contact our firm at 425-553-0031 to request a copy of this relationship summary and other up-to-date information.

Questions to Ask Us:

- 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?