

NerdWallet Wealth Partners, LLC  
Form CRS Relationship Summary  
Dated June 24, 2025

NerdWallet Wealth Partners, LLC (“NWWP”) is an SEC-registered investment adviser. Brokerage and investment advisory services and fees differ, and it is important for you to understand the differences. Free 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?**

Our services include investment management services and ongoing financial planning.

#### **Monitoring:**

Under our investment management services, your investment accounts will be monitored and reviewed regularly on at least a quarterly basis by our firm. We will provide advice to you regarding the investments and allocation of your accounts to ensure they are positioned appropriately based on your goals and objectives.

#### **Investment Authority:**

Through our investment management service, we give you the option to grant us the authority to purchase or sell securities without obtaining your consent in advance.

#### **Limited Investment Offerings:**

Our investment recommendations will be limited to mutual funds, exchange traded funds, and individual stocks. Other firms may provide wider investment recommendations at the same or differing costs.

#### **Account Minimums and other Requirements:**

There are no minimums to establish a relationship.

For Additional Information regarding the services we make available to you, please review Item 4 of our Form ADV Part 2A.

#### **Ask your Adviser:**

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

### **What fees will I pay?**

We will deduct fees directly from your managed account (asset-based fees) on a quarterly basis.

We are paid for investment management services based on a percentage of your managed account value. Therefore, the more assets there are in your advisory account, the more you will pay in fees, and we therefore have an incentive to encourage you to increase the assets in your account. This is a conflict of interest. However, we mitigate this conflict of interest by ensuring all recommendations and investment decisions we make are in your best interest.

Our fees are exclusive of brokerage commissions, transaction fees, and other related costs and expenses which you may incur.

Additional fees you may pay include certain charges imposed by custodians such as custodial fees, deferred sales charges, or other fees and taxes on brokerage accounts and securities transactions. Mutual fund and

exchange-traded funds also charge internal management fees, which are disclosed in a fund's prospectus.

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 your Adviser: "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.

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

**Additional Information**

NWWP is an indirect wholly owned subsidiary of NerdWallet, which operates platforms that deliver guidance through educational content, tools and calculators, and product marketplaces so that consumers and small to medium sized businesses may learn about, compare, and shop for financial products online. NerdWallet or an affiliate may earn referral fees, lead generation fees, advertising revenue, or other compensation, if Clients we direct to NerdWallet or a NerdWallet affiliate for education or information or other resources, transacts with the service providers on NerdWallet's or such NerdWallet affiliate's website. NerdWallet and its affiliates also market NWWP services to their users on the NerdWallet or NerdWallet affiliate websites to generate additional Clients for our services. This creates a conflict of interest, because our relationship with NerdWallet and its affiliates influences our decision to direct clients to NerdWallet's editorial content over third-party options, which benefits NerdWallet.

NWWP is also under common control with NerdWallet Advisory LLC doing business as NerdWallet Advisors ("NerdWallet Advisory"), an SEC registered investment adviser and wholly-owned subsidiary of NerdWallet. NerdWallet Advisory operates an online platform called "Advisors Match," which uses an algorithm to provide automated investment advisory services to users by referring or "matching" them with registered investment advisers or other matching services.

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

Our financial professionals are compensated on a salary basis and are not paid commissions or other compensation based on the amount of the business generated from their work.

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

No. You can visit [Investor.gov/CRS](https://www.investor.gov/crs) for a free search tool to research us and our financial professionals.

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

For additional information about our services, visit our website: [www.nerdwalletwealthpartners.com](http://www.nerdwalletwealthpartners.com). If you would like additional, up-to-date information or a copy of this disclosure, please call 917-275-7821.

Ask your Adviser: 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?