

Introduction

Our firm, Scout 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 adviser bound by a fiduciary duty to our clients that offers investment advisory services to retail investors. Our advisory services include Asset Management, Comprehensive Portfolio Management, Financial Planning & Consulting, and Retirement Plan Consulting. If you open an advisory account with our firm, we'll meet with you to understand your current financial situation, existing resources, goals, and risk tolerance. Based on what we learn, we'll recommend a portfolio of investments that is monitored at least annually, and if necessary, rebalanced to meet your changing needs, stated goals and objectives. We'll offer you advice on a regular basis and contact you at least annually to discuss your portfolio.

Financial Planning & Consulting is also offered as a separate service for an additional flat fee or hourly fee. We do not monitor your investments for the Financial Planning & Consulting service.

When establishing an advisory account with us, you authorize us in the advisory agreement to buy and sell investments in your account at our discretion, without requiring your prior approval. Any specific limitations to this discretionary authority will be outlined in the signed advisory agreement. This discretionary relationship will remain in effect until the advisory agreement is terminated by either you or our firm.

Our firm does not impose requirements for opening and maintaining accounts or otherwise engaging us. However, our firm generally charges a minimum fee of \$1,500 for standalone Financial Plans.

Additional information about our advisory services is located in Item 4 of our Firm Brochure, which is available online by searching Scout Wealth Advisors at <https://adviserinfo.sec.gov>.

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?

You will be charged an ongoing quarterly fee based on the value of the investments in your account. The fee for our Asset Management service as well as our Comprehensive Portfolio Management service does not exceed 2%. 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. The amount you pay will depend, for example, on the services you receive and the amount of assets in your account. Our firm's fees will be automatically deducted from your advisory account, which will reduce the value of your advisory account. In rare cases, our firm will agree to send you invoices rather than automatically deduct our firm's fees from your advisory account.

Financial Plans done in conjunction with Comprehensive Portfolio Management Services are complimentary. For standalone financial plans, our maximum flat fee is \$3,000, the maximum hourly rate is \$350 for our Financial Planning & Consulting service.

The broker-dealer that holds your assets charges you a transaction fee when we buy or sell an investment for you. The broker-dealer's transaction fees are in addition to our firm's fees for our Asset Management or Comprehensive Portfolio Management services.

You may also pay charges imposed by the broker-dealer 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 may select third party money managers who will assist us with managing your account. If selected, they will charge you a fee, which will be described to you in their Form ADV or their service agreement.

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.

Additional information about our fees is located in Item 5 of our Firm Brochure, which is available online by searching Scout Wealth Advisors LLC at <https://adviserinfo.sec.gov>.

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:

Representatives of our firm are insurance agents/brokers. They may offer insurance products and receive customary fees as a result of insurance sales. A conflict of interest arises as these insurance sales create an incentive to recommend products based on the compensation adviser and/or our supervised persons earn. In every case, however, it is the commitment of our firm and its associates to follow our fiduciary duty to act in the best interests of the client.

Additional information about our conflicts of interest is located in Item 10 of our Firm, which is available online by searching Scout Wealth Advisors LLC at <https://adviserinfo.sec.gov>.

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.

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

No, our financial professionals do not have any legal and disciplinary history. 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 the SEC's website at www.adviserinfo.sec.gov by searching Scout Wealth Advisors LLC. You may also contact our firm at (844) 839-9100 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?