



Altura Private Wealth LLC

Form CRS “Client Relationship Summary”

ADV Part 3 March 20, 2026

Item 1: Introduction

ALTURA PRIVATE WEALTH LLC is an investment adviser registered with the Securities and Exchange Commission offering advisory accounts and services. Brokerage and investment advisory services and fees differ, and it is important that you understand the differences. This document gives you a summary of the types of services and fees we offer. Please visit www.investor.gov/CRS for free, simple tools to research firms and financial professionals, as well as educational materials about broker-dealers, investment advisers, and investing.

Item 2: Relationships and Services

[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? What investment services and advice can you provide me?](#)

Our firm primarily offers the following investment advisory services to retail clients: portfolio management (we review your portfolio, investment strategy, and investments); financial planning (we assess your financial situation and provide advice to meet your goals); solicitor/selection of other advisers (we select a third-party adviser for you to use). As part of our standard services, we typically monitor client accounts on a quarterly basis.

Our firm has discretionary management without any material limitations. We limit the types of investments that are recommended since not every type of investment vehicle is needed to create an appropriate portfolio, but do not limit these investments to proprietary products. Our firm does not have a minimum account size. Please also see our Form ADV Part 2A (“Brochure”), specifically Items 4 & 7.

Item 3: Fees, Costs, Conflicts, and Standard of Conduct

[Questions to ask us: 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? How might your conflicts of interest affect me, and how will you address them?](#)

Up to 2% depending on Model Portfolio or investment strategy utilized Fees on Investments Outside Model Portfolios.

Clients may be charged a ‘Reporting Fee’ which represents a pass-through cost for the third-party reporting software (e.g., Advyzon, Black Diamond or Morningstar) used by the Firm. This fee is strictly a reimbursement of the cost charged by the vendor and is not marked up by the Firm. Performance-based fees can be negotiated between a qualified client and an Advisor. Please see our ADV Part 2A, item 5 and item 6 for more information.

[What fees will I pay?](#) Our fees vary depending on the services you receive. Additionally, the amount of assets in your account affects our advisory fee; the more assets you have in your advisory account, the more you will pay us and thus we have an incentive to increase those assets in order to increase our fee.

The basis for negotiating the advisory fees are dependent upon account sizes, family accounts, investment goals, risk tolerance, time horizon, clients’ involvement and depth of the financial planning, and complexity of the strategy. You pay our fees even if you do not have any transactions and the advisory fee paid to us generally does not vary based on the type of investments selected. Please also see Items 4, 5, 6, 7 & 8 of our Brochure.

Some investments (e.g., mutual funds, variable annuities, etc.) impose additional fees (e.g., transactional fees and product-level fees) that reduce the value of your investment over time. The same goes for any additional fees you pay to a custodian. Additionally, you will pay transaction fees, if applicable, when we buy or sell an investment for your account. 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. Please also see our Brochure for additional details.

[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:

For AUM fees, the more assets you have in your advisory account, the more you will pay us and thus we have an incentive to increase those assets in order to increase our fee.

[How do your financial professionals make money?](#)

Primarily, we and our financial professionals receive cash compensation from the advisory services we provide to you because of the advisory fees we receive from you. This compensation may vary based on different factors, such as those listed above in this Item. Moreover, we receive compensation from third-parties for recommending certain investments and thus have an incentive to recommend those investments over other choices. Please also see Item 10 of our Brochure for additional details.

Item 4: Disciplinary History

[Do any Advisers within Altura Private Wealth have a legal or disciplinary history?](#)

No. We encourage you to visit Investor.gov/CRS for a free and simple search tool to research any of our financial professionals.

Item 5: Additional Information

Conversation Starter:

[“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?”](#)

You can find additional information regarding our firm in our Form ADV Part 2A “Firm Brochure” by visiting www.adviserinfo.sec.gov and searching for our firm by its name or our unique CRD number (340533). You can obtain a copy of this relationship summary by contacting our main office at 801-574-0308. If you have a problem with your investments, investment account, or a financial professional, please contact us in writing at 839 Camille Circle, Centerville, UT 84014. For additional information about our financial professionals, visit

<https://brokercheck.finra.org/> for a free and simple search tool to research our firm and our financial professionals. To report a problem to the SEC, visit Investor.gov or call the SEC’s toll-free investor assistance line at (800) 732-0330.