CVNA, LLC D/B/A Woodland Wealth Partners
Client Relationship Summary (Form CRS)

March 2026

Introduction

CVNA, LLC d/b/a Woodland Wealth Partners (“Adviser”, “Firm,” “we,” “us,” or “our”) is registered with the U.S. Securities and Exchange Commission (SEC) as an investment adviser. We provide advisory services to individuals, families, pension plans, businesses and charitable organizations. It is important that you understand the types of relationships and services we offer, the fees you will pay, and any conflicts of interest that may exist. Brokerage and advisory services and fees differ so it is important for you to understand the differences. You can find free and simple tools 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 do we offer?

We offer personalized wealth management services, which may include investment advice, financial planning, retirement planning, and related services. Our services are tailored to your goals, risk tolerance, and financial situation. If you grant us discretionary authority, we can buy and sell investments in your account without asking you for permission before each transaction. You may place reasonable restrictions on this authority or revoke it at any time in writing. We generally review client accounts quarterly. Significant life events or changes in your financial situation may trigger more frequent reviews. Any account minimums will be disclosed in your advisory agreement.

Additional information
For more details about our services, see Items 4, 7, 8, 13, and 16 of our Form ADV, Part 2A.

Conversation Starters – Ask your Financial Professional:
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 fees will I pay?

We charge advisory fees based on the value of the assets we manage for you. Fees are typically billed quarterly. The fees will be transparent, outlined and agreed to prior to commencement of the engagement. Because our fees are based on assets under management, we have an incentive to increase the assets in your account. We address this conflict by following a fiduciary standard, which requires us to act in your best interest at all times. You may also pay fees to custodians holding your assets and fees related to investments, such as mutual fund expenses. These fees are separate from our advisory fees and will reduce the value of your investments over time. The fee-paying arrangements for pension consulting services will be determined on a case-by-case basis and will be detailed in the signed agreement. Client(s) will be invoiced directly for the above fees. 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.

Conversation Starters – Ask your Financial Professional:
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 are some examples to help you understand what this means:

If your account is subject to a performance-based fee it will be identified in your agreement with us. Performance-based fees may be perceived to present an incentive to maximize gains in that account by making investments that are riskier and more speculative than would be the case in absence of an incentive or performance fee. Furthermore, we could also be perceived as favoring performance-fee accounts over other accounts, such as by allocating more profitable investment opportunities or dedicating greater resources to those accounts. The Firm seeks to mitigate these potential conflicts by maintaining and enforcing policies and procedures designed to ensure that investment decisions and the allocation of investment opportunities are not influenced by fee arrangements and are consistent with our fiduciary obligations to all clients.

Conversation Starters – Ask your Financial Professional:

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 a portion of the advisory fees that clients pay to the Firm for managing assets under management. This presents a conflict of interest and incentive for the financial professional to encourage you to increase the assets in your account.

Do we have legal or disciplinary history?

No. Neither the firm nor our financial professionals have any legal or disciplinary history. You can research our firm and our financial professionals for free at www.investor.gov/CRS.

Conversation Starters – Ask your Financial Professional:

As a Financial professional, do you have any disciplinary history? If yes, for what type of conduct?

Additional Information

You can obtain additional information about our services, request a copy of this relationship summary, or ask any questions by contacting us at 330-416-5509 or Compliance@woodlandwealthpartners.com.

Conversation Starters – Ask your Financial Professional:

Who is my primary contact person? Is he or she a representative of an investment adviser? Who can I talk to if I have concerns about how this person is treating me?