Dated July 20, 2026

Heritage Haus Wealth Partners, LLC

Client Relationship Summary (Form CRS)

Item 1. Introduction

Heritage Haus Wealth Partners, LLC ("Heritage Haus Wealth", "Firm", "We", "Us", "Our") is an SEC registered investment advisor that provides advisory services for a fee rather than for brokerage commissions. As a retail investor, it is important to understand the differences between services and fees of an investment advisor and a broker-dealer. Investor.gov/CRS offers free and simple tools to research firms and financial professionals. Additionally, it also provides educational materials about broker-dealers, investment advisors, and investing.

Item 2. What investment services and advice can you provide me?

What investment services and advice can you provide me?
We offer the following investment advisory services to you:

Wealth Management: Wealth management services include asset management and financial planning. Services may include, but are not limited to, a review of investment accounts, including reviewing asset allocation and providing repositioning recommendations; strategic tax planning; a review of retirement accounts and plans that have recommendations; a review of insurance policies and recommendations for changes, if necessary; one or more retirement scenarios; estate planning review and recommendations; and education planning with funding recommendations.

We will offer you advice on a regular basis. We will regularly monitor your account. We will manage your account on a discretionary basis (which means that we can buy and sell investments in your account without asking you in advance).

We generally do not limit clients to proprietary products or a limited menu of products and types of investments. This service will continue until terminated pursuant to the terms of your executed Advisory Agreement. We do not have a minimum to open an account.

ERISA Services: We serve as a limited scope ERISA 3(21) fiduciary that can advise, help and assist plan sponsors with their investment decisions on a non-discretionary basis. Plans are monitored on an ongoing basis. We have a fiduciary duty to act in the best interest of the client. The plan sponsor is still ultimately responsible for the decisions made in their plan, though using us can help the plan sponsor delegate liability by following a diligent process.

Estate Planning Services: Through our partnership with an independent third-party technology company, Wealth, Inc. ("Wealth"), we can facilitate the preparation of various estate planning documents for clients. Such services are generally separate from any investment management and/or financial planning services that we may render to a client, and the exact scope of such estate planning services will depend on the nature of a client's specific estate planning needs.

Neither Heritage Haus Wealth nor Wealth renders legal advice or services. Wealth offers the ability to consult with licensed attorneys in various jurisdictions at an additional charge, and subject to additional terms and conditions.

Additional Information
For more information about our services, we recommend reading our ADV Part 2A Items 4 and 7.

Conversation Starters
"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?"

Item 3. What fees will I pay?

We are paid for our services as follows:

Wealth Management: We charge an asset-based fee which is usually assessed monthly in arrears. The total annual fees paid to Heritage Haus Wealth are between .90% and 1.20% depending on AUM. Accounts with an AUM of greater than $3,000,000 are fee negotiable. The minimum annual fee based on AUM is $2,000. This is greater than the stated maximum fee of 1.20% when the account, or aggregate accounts, value is below approximately $167,000. The asset-based fee reduces the value of your account and will be generally deducted from your account. Generally, the more assets you have in the advisory account, the more you will pay in total fees. We therefore have an incentive to increase the assets in your account in order to increase our fees, which is a conflict of interest. You pay our advisory fee even if there were no transactions within the account.

ERISA: The annual fees are based on the market value of the Included Assets and shall not exceed 1.20%. Fees may be charged quarterly or monthly in arrears or in advance based on the assets as calculated by the custodian or record keeper of the Included Assets on the last business day of the previous billing period.

Estate Planning Services: Services are generally separate from any investment management and/or financial planning services that we may render to a client. We may pay for your access to Wealth. Wealth offers the ability to consult with licensed attorneys in various jurisdictions at an additional charge, and subject to additional terms and conditions.

Other: 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. For more information regarding our fees and costs, review ADV Part 2A Item 5.

Conversation Starters
"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.

Investment Accounts: Generally, we get paid based on the assets in your account. We may recommend that you add assets or funds into that account. Even though that advice may be in your best interest, that advice is conflicted because the more money in your account, the more we would collect in fees from you.

Conversation Starters
"How might your conflicts of interest affect me, and how will you address them?"

Additional Information
For more information about our conflicts of interest, we recommend reading our ADV Part 2A, Items 4 and 10.

How do your financial professionals make money?
Our financial services professionals do not receive any economic benefit from external sources.

For more information about our conflicts of interest, we recommend reading our ADV Part 2A, Items 4 and 10.

Item 4. Do you or your financial professionals have legal or disciplinary history?

Yes, please visit Investor.gov/CRS for a free and simple search tool to research Heritage Haus Wealth Partners, LLC and our financial professionals.

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

Item 5. Additional Information

To find additional information about Heritage Haus Wealth Partners, LLC, such as a full copy of the ADV Part 2, and to request a copy of the *Customer Relationship Summary,* please go to https://adviserinfo.sec.gov/ or send us an email at msrulowitz@heritagehauswp.com. If you would like to request up-to-date information as well as to request a copy of the relationship summary, please contact us via phone at (830) 316-3590.

Conversation Starters
"Who is my primary contact person? Is he or she a representative of an investment advisor or a broker-dealer? Who can I talk to if I have concerns about how this person is treating me?"