

Aligned Wealth Advisors, LLC
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Customer Relationship Summary, September 2026

Introduction	Aligned Wealth Advisors, LLC (the “Firm” or “we” or “us”) is registered with the Securities and Exchange Commission (SEC) as an investment adviser. Brokerage and investment advisory services and fees differ and it is important for you to understand these differences. Free and simple tools are available to research firms and financial professionals at http://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 advisory services include portfolios managed on a discretionary basis by your financial adviser, 3rd party separately managed accounts, manager models, pooled investment vehicles, wealth management consulting and financial planning. Investment strategies include the use of a variety of securities including but not limited to stocks, bonds, options, mutual funds, REITs, private placements and ETFs when managing individual portfolios. As part of our advisory services, we provide ongoing monitoring of your investments. Our services are primarily “discretionary” meaning that we accept authority and responsibility for making investments on your behalf within the scope of our advisory relationship. In some cases, such as investments in private funds, you make the ultimate decision regarding the purchase and sale of such private funds. Third party managers will invest your account on a discretionary basis. Currently, we do not have a minimum account value to open or maintain an account with us. <i>For additional information</i>, please see Form ADV, Part 2A brochure (Items 4 and 5 of Form Part 2A) and other applicable documents. <i>Conversation Starters.</i> 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?	When we act as your investment adviser you will pay us in one of the following ways, as described in the advisory agreement you enter into with us. Clients may also be subject to a minimum annual fee, as outlined in their advisory agreement. 1. Fixed Annual Fee. In certain cases, we charge a fixed annual fee for advisory services meaning that the fee is calculated as a percentage of the value of the assets. This fee is negotiated based on the scope and complexity of the engagement and does not vary with the amount of assets under management unless otherwise stated in the applicable agreement. 2. Flat Asset-Based Fee. In other cases, we charge a fee using a flat asset-based fee schedule, which applies a single fee rate to all assets in the account. This fee is negotiated based on the scope and complexity of the engagement 3. Tiered Rate Fee Schedule. In other cases, we charge a fee using a tiered rate schedule, which applies different fee rates to portions of the portfolio based on the stated breakpoints. Assets in each tier are billed at the rate for that tier, resulting in a blended fee across the entire portfolio. When you enter into an advisory relationship where we earn compensation based on the value of the assets in your account or portfolio, we have a conflict of interest in so far as the more assets in your advisory accounts/portfolio, the greater our fee. Our investment advisory fees are negotiable. If you choose to open a separately managed account, you will also pay the 3rd party manager an asset-based investment advisory fee. Similarly, if you purchase a mutual fund, exchange traded fund or other pooled investment vehicle, in your advisory account, our advisory fee will not include the costs and expenses born by the fund itself, including its investment management fees and operating costs. In addition to the advisory fees paid to us, you also incur certain charges imposed by other third parties. These additional charges may include investment management fees charged by third party managers, securities brokerage commissions, transaction fees, custodial fees, fees attributable to alternative assets, reporting charges, fees charged by third-party managers, margin and other borrowing costs, charges imposed directly by a mutual fund or ETF in a client’s account, as disclosed in the fund’s prospectus (e.g., fund management fees and other fund expenses), deferred sales charges, odd-lot differentials, transfer taxes, wire transfer and electronic fund fees, and other fees and taxes on brokerage accounts and securities transactions.

	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. <i>For additional information</i>, please see Form ADV, Part 2A brochure (Items 5 and 6) and other applicable documents. Conversation Starter. 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. • We use Vise AI Advisors, LLC ("Vise") as a platform provider for certain client accounts. In addition, the owner of Aligned holds a minority ownership interest in Vise's parent company. As a result, we have a financial incentive to recommend Vise over other available platform providers or managers. We address this conflict by evaluating Vise using the same criteria we apply to other providers and recommending Vise only when we believe it is in the client's best interest. We do not receive any portion of the advisory fees paid by clients to Vise. • We have an arrangement with NewEdge Wealth, LLC ("NewEdge"), which provides operational, technology and platform services to Aligned and whose model investment strategies we may recommend for client accounts. Because of this relationship, we have an incentive to recommend NewEdge's model strategies and platform over those of other providers. We address this conflict by evaluating NewEdge using the same criteria we apply to other model providers and recommending NewEdge only when we believe it is in the client's best interest. Conversation Starter. Ask your financial professional— How might your conflicts of interest affect me, and how will you address them? <i>For additional information</i>, please see Form ADV, Part 2A brochure and other applicable documents.
How do your financial professionals make money?	Our financial professionals are compensated based on the following factors which may raise conflicts of interests: --The amount of client assets they service. This results in an incentive to favor clients with more assets being serviced. --The time and complexity required to meet the client's needs. This results in an incentive to spend more time on issues than are required. --The product sold. This results in an incentive to sell certain investments and more frequently.
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 us and our financial professionals. Conversation Starter. Ask your financial professional— As a financial professional, do you have any disciplinary history? For what type of conduct?
	For additional information about our services, You can find additional information about our advisory services in our Form ADV 2A Brochure. You can request an up-to-date copy of this relationship summary by calling (305) 702-3030. Conversation Starter. Ask your financial professional— 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?