

Strivus Wealth Partners, LLC

Form CRS – Customer Relationship Summary – January 8, 2025

Item 1: Introduction

Strivus Wealth Partners (SWP) is an investment adviser registered with the Securities and Exchange Commission (“SEC”). 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 [Investor.gov/CRS](https://investor.gov/CRS), which also provides educational materials about broker-dealers, investment advisers, and investing.

Item 2: Relationships and Services

What investment services and advice can you provide me?

SWP is an independent financial adviser providing financial planning, investment management services, and other related services.

Monitoring: Your assigned investment advisor representative will be responsible for his/her own clients and will monitor your account(s) on a continuous basis to ensure the advisory services provided to you are consistent with your investment needs and objectives. We recommend a Client meeting and formal account review at least annually, and a reminder postcard will be sent out to you in order to schedule a meeting.

Investment Authority: We provide discretionary portfolio services where the investment advice provided is custom tailored to meet your needs and investment objectives. Subject to any written guidelines you may provide, we will be granted discretion and authority to manage the account. Accordingly, we are authorized to perform various functions, at your expense, without further approval from you. Such functions include the determination of securities to be purchased and/or sold, and the amount of securities to be purchased and/or sold in your account.

Limited Investment Offerings: We offer advice on various types of investments, including, but not limited to, equity securities, corporate debt securities, commercial paper, certificates of deposit, municipal securities, mutual funds, exchange traded funds, US Government securities, and interests in partnerships investing in real estate. You may request that we refrain from investing in particular securities or certain types of securities. You must provide these restrictions to our firm in writing.

Account Minimums and Other Requirements: In general, we require a minimum of \$100,000 to open and maintain a management account with us. At our discretion we may waive or lower this minimum account size. We will also combine “household” account values for you and your minor children, joint accounts with your spouse, and other types of related accounts to meet the stated minimum.

For additional information, please see our Form ADV, Part 2A brochure (Items 4 and 7 of Part 2A) at the following link: <https://adviserinfo.sec.gov/firm/summary/173580>.

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?*

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

What fees will I pay?

Financial Planning Services: Our financial planning services break down into ongoing financial planning or project-based financial planning. Our fee for ongoing financial planning are paid monthly or quarterly in advance, ranging from \$0 to \$2,500 a month or \$0 to \$7,500 a quarter (\$0 - \$30,000 annually). For project-based financial planning, we charge either a fixed or hourly fee. Fixed fee rates range between \$2,000 and \$20,000. Our hourly rate is \$400 per hour. For both of these options, the fee range is dependent upon variables including the specific needs of the Client, complexity, estimated time, research, and resources required to provide services to you, among other factors we deem relevant. Fees are negotiable and the final agreed upon fee will be outlined in your Advisory Contract.

Portfolio Management Services: The annual fee for portfolio management services is billed quarterly in advance, based on the market value of the account on the last business day in the quarter. The fee is based on a percentage of assets under management and is negotiable. The annualized fees for investment management services are based on the following fee schedule and are negotiable at the adviser’s discretion:

Assets Under Management	Annual Advisory Fee
\$0 - \$499,999	1.50%
\$500,000 - \$999,999	1.25%

\$1,000,000 - \$4,999,999	1.00%
\$5,000,000 - \$6,999,999	0.95%
\$7,000,000 - \$9,999,999	0.85%
\$10,000,000 - \$19,999,999	0.75%
\$20,000,000 and Above	0.50%

Description of Other Fees and Costs: As part of our Investment Advisory Services to you, we may invest or recommend that you invest in mutual funds and exchange-traded funds. The fees that you pay to our firm for Investment Advisory Services are separate and distinct from the fees and expenses charged by the mutual funds or exchange-traded funds (described in each fund's prospectus to their shareholders). These fees will generally include a management fee and other fund expenses. You may also incur a few transaction charges and/or brokerage fees when purchasing or selling securities. These charges and fees are typically imposed by the custodian through whom your account transactions are executed.

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 additional information, please see our Form ADV, Part 2A brochure (Item 5 of Part 2A) at the following link:
<https://adviserinfo.sec.gov/firm/summary/173580>

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 is one example to help you understand what this means: The Firm is compensated based on a percentage of client assets under management. As such, we have an incentive to increase assets in client accounts.

CONVERSATION STARTER: *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?**

SWP financial professionals are paid a salary. Owners of SWP are paid a percentage of annual profit.

Item 4: Disciplinary History

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

No, neither SWP nor its financial professionals have legal or disciplinary history. Visit Investor.gov/CRS for a free and simple search tool to research your financial professionals.

CONVERSATION STARTER: *Ask your financial professional:*

- *As a financial professional, do you have any disciplinary history? For what type of conduct?*

Item 5: Additional Information

Additional information about SWP is available on the SEC's website at www.adviserinfo.sec.gov. If you would like additional, up-to-date information or a copy of this relationship summary please call (904) 685-1505 or visit the following link:
<https://adviserinfo.sec.gov/firm/summary/173580>

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?*