Measured Wealth

10/22/2026

Form CRS – Customer Relationship Summary

Introduction

Measured Wealth Private Client Group, LLC is registered with the Securities and Exchange Commission as an investment adviser and, as such, we provide advisory services rather than brokerage services. Brokerage and investment advisory services and fees differ and it is important for you, our client, to understand the differences. Additionally, free and simple tools are available to research firms and financial professionals at Investor.gov/CRS, which also provides educational materials about broker-dealers, investment advisers, and investing. This document is a summary of the services and fees we offer to "retail" investors, which are natural persons who seek or receive services primarily for personal, family, or household purposes.

What investment services and advice can you provide me?

We offer the following investment advisory services to retail investors: Financial Planning, Portfolio Management, Pension Consulting, and Selection of Other Advisers. We also serve as portfolio manager to a wrap fee program (for legacy accounts only; the program is closed to new clients). Detailed information regarding our services, fees and other disclosures can be found in our Form ADV Part 2A Items 4, 7, and 8 and Form ADV Part 2 Appendix 1 Brochures Items 4 and 5 by clicking this link: https://adviserinfo.sec.gov/firm/brochure/170442.

Account Monitoring: If you open an investment account with our firm, as part of our standard service we will monitor your investments on an ongoing basis. We review our investment models on an ongoing basis and review your account and investment objectives against them at least annually.

Investment Authority: We manage investment accounts on a discretionary basis whereby we will decide which investments to buy or sell for your account. We have discretion to select, retain or replace third-party managers to manage your accounts. You may limit our discretionary authority (for example, limiting the types of securities that can be purchased or sold for your account) by providing our firm with your restrictions and guidelines in writing. We also offer non-discretionary investment management services whereby we will provide advice, but you will ultimately decide which investments to buy and sell for your account. You have an unrestricted right to decline to implement any advice provided by our firm on a non-discretionary basis.

Investment Offerings: We provide advice on various types of investments. Our services are not limited to a specific type of investment or product.

Account Minimums and Requirements: Our services are recommended for accounts of $250,000 or more; we may accept lower account balances at our discretion. For written financial plans, we generally charge a minimum fee of $1,500.

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?

The following summarizes the principal fees and costs associated with engaging our firm for investment advisory services. For detailed information, refer to our Form ADV Part 2A, Items 5 and 6 and Form ADV Part 2 Appendix 1 Brochures by clicking this link: https://adviserinfo.sec.gov/firm/brochure/170442.

Asset Based Fees: Our portfolio management fee is a tiered percentage of the value of the assets in your account (an additional 0.25% applies to accounts using an option strategy), payable quarterly in advance based on the value of your account on the last day of the previous quarter. The more assets there are in your advisory account, including cash, the more you will pay in fees. We therefore have an incentive to encourage you to increase the assets in your account.

Hourly & Fixed Fees: Financial planning and consulting are charged at an hourly rate or a flat fee based on the scope and complexity of the engagement. We require a fifty-percent (50%) retainer with the remainder due within thirty (30) days of delivery of your financial plan or consultation.

Wrap Program Fees: Payable quarterly in advance based on the value of your account on the last day of the previous quarter. The wrap fee includes most transaction costs and fees to the broker-dealer or bank that holds your assets (called "custody"), and as a result wrap fees are typically higher than non-wrap advisory fees. Since our firm pays the transaction costs associated with securities transactions in your account, we have an incentive to minimize the trading in your account.

Other Advisory Fees: Third-party managers also charge their own fees, which are separate from and in addition to our fees. Assets managed by third-party managers are included in calculating our fee.

Clients pay additional fees and expenses. Examples include custodian fees, account maintenance fees, fees related to mutual funds and exchange-traded funds, transaction charges when purchasing or selling securities, trade-away fees, margin interest, and other product-level fees associated with your investments.

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.

Affiliated Insurance Agency: We are affiliated through common ownership with Measured Wealth Risk Management, LLC, a licensed insurance agency, and some of the persons providing investment advice on behalf of our firm are licensed as independent insurance agents and/or work directly with our affiliate. These persons will earn commission-based compensation for selling insurance products, such as annuities and life insurance. Insurance commissions are separate from and in addition to our advisory fees. This practice presents a conflict of interest because they have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs, and to favor products that pay commissions up front over advisory services that pay fees over time. Additionally, we have a direct or indirect financial incentive to recommend our affiliated firm's services to you.

Third-Party Payments: Charles Schwab, the custodian we recommend, provides us research, technology and other services at no cost or a discount. Advisors Excel, an insurance marketing organization our affiliate uses, provides marketing and business development support and incentive trips, and product sponsors reimburse some travel and marketing expenses of our financial professionals. These benefits give us an incentive to recommend Schwab and those sponsors' products.

Referral Arrangements: We pay Schwab (through the Schwab Advisor Network) and a credit union a portion of the advisory fees we receive from clients they refer to us. You do not pay more as a result.

Asset-Based Fees: Most of our revenue comes from asset-based fees, so we have an incentive to grow the assets in your account, including by recommending that you roll over retirement plan assets to an account we manage or use margin (our fee is charged on the gross account value, including securities bought with borrowed money).

Refer to our Form ADV Part 2A and Form ADV Part 2 Appendix 1 Brochures by clicking this link https://adviserinfo.sec.gov/firm/brochure/170442 to help you understand what conflicts exist.

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?

The financial professionals servicing your account(s) receive a salary and a portion of the advisory fee that you pay us. Some of our financial professionals also earn insurance commissions and receive expense reimbursements from product sponsors, which gives them an incentive to recommend those products (see above).

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

Yes. Visit Investor.gov/CRS for a free and simple search tool to research us and our financial professionals.

Conversation Starters. *Ask your financial professional:*

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

Additional Information

You can find additional information about our investment advisory services at www.MeasuredWealth.net and https://adviserinfo.sec.gov/firm/brochure/170442. You can request up-to-date information and a copy of the relationship summary by calling us at (603) 431-1444.

Conversation Starters. *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?***