Item 1. Introduction – NexWealth LLC, is an independent, employee-owned investment management firm, registered with the Securities and Exchange Commission as an investment adviser under the Investment Advisers Act of 1940. We provide investment advisory services but do not provide brokerage services. It is important for you to understand the differences between investment advisers and broker-dealers, including the difference in fees. **How can I find out more about financial professionals and Form CRS?** The SEC offers help at www.investor.gov/CRS. This website provides free and simple tools to allow you to research firms and financial professionals. You can also find educational materials about investment professionals and investing.

Item 2. What investment services and advice can you provide me? We are a fee only advisor and offer investment advisory services to individuals, high net worth clients, pension and profit-sharing plans, trusts, estates, charitable organizations, corporations and business entities consistent with your investment goals, objectives, time horizons, risk tolerance, and prior investment experience. We use strategies consisting of individual stocks, bonds, mutual funds, exchange traded funds, and other securities we may determine will help us best meet your investment objectives. We also provide investment advice about investments held in your existing portfolios. The implementation of our investment recommendations and review of your investment program is an essential part of our service to you. We generally use Fidelity and/or Schwab to provide custody and execute your transactions. At our sole discretion we may utilize other custodians and/or broker-dealers, if appropriate. For more detailed information about our services, please refer to Items 4 and 7 of our ADV Part 2A.

Conversation Starters: (i) Given my financial situation, should I choose an investment advisory service? Why or why not? (ii) How will you choose investments to recommend to me? (iii) What is your relevant experience, including your licenses, education, and other qualifications? What do these qualifications mean?

Monitoring – We continually monitor the underlying securities in your portfolio(s). We do not provide regular reports to you, however, you can request a report at any time detailing your account holdings and performance. There are limitations to how we monitor your assets. Assets are held by your custodian and while we reconcile your account against the custodian, they will provide you with periodic statements. At a minimum you should receive a quarterly statement from your custodian and possibly more frequently than that. You should always review your statement closely.

Investment authority – We have discretionary authority with most of our clients which means we execute buy and sell decisions for you without your advance approval. This authority is defined in our agreement with you. We generally invest using a long-term approach; however, we can invest on a short-term basis for certain opportunities. Short-term investing could result in higher trading costs than long-term investing.

Limited investment offerings – We offer clients the ability to invest in various strategies utilizing different investments such as other sub-advisors, mutual funds, exchange traded funds, and other investments that are derived from various asset classes. We generally try to protect assets in down markets and participate reasonably in up markets. If we work directly with you, we can add various investment vehicles to your overall investment allocation and diversify your core investments. Keep in mind that other firms may offer choices that are more diversified, provide less risk, or have lower fees than those we provide you.

Account minimums and other requirements – When we work directly with you, we negotiate both a fee schedule and account asset minimum depending on several different factors. This may include complexity of the account, other assets or accounts, and the type and nature of the services we provide. We will make this determination in our sole discretion.

Item 3. Fees and Costs, Legal Obligations, Conflicts of Interest, Standard of Conduct, How Our Financial Professionals Make Money

What fees will I pay? We encourage you to speak with us about fees. You will pay contractually agreed-upon fees on a quarterly basis, in advance based on assets that we manage on your behalf. These fees are negotiable based on various factors; type and nature of services we provide, amount of assets we manage, complexity of the account, and anticipated future additional assets and accounts. In certain circumstances, a fixed fee for services may be offered as an option. All fees are determined on a client-by-client basis. We will never raise your fees

unless agreed upon in writing and made a part of our agreement with you. The assets on which we bill include securities and cash as valued by your custodian. Where appropriate we will use our affiliated advisor's proprietary mutual fund; however, we will not charge a fee on the assets invested in the proprietary fund when calculating quarterly fees. If a sub-advisor is selected to manage a portion of your assets, you will incur additional expenses in the form of the sub-advisor's fee on top of the fee you pay as outlined in our agreement with you.

There may be additional fees charged to you such as custodian fees, account maintenance fees, fees related to mutual funds and ETFs, and other transactional and product-level fees. We do not receive any portion of these fees. We do not sponsor any wrap programs.

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 Starter: (i) Help me understand how these fees and cost might affect my investments. (ii) 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 advisor? How else does your firm make money and what conflicts of interest do you have?

When we act as your investment advisor, we must act in your best interest and not put our interests 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. Here are some examples to help you understand what this means.

- An advisor can recommend an affiliated advisor's mutual fund over another higher performing fund
- An advisor can recommend its own services when others are equally capable
- An advisor can favor a larger client who generates higher total fees

Please refer to our Form ADV Part 2A to learn more about conflicts of interest. You can see options to access our ADV Part 2A in Item 5 below.

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

How do your financial professionals make money? Our financial professionals receive a salary, bonus opportunity, and a profit-sharing contribution. Bonuses are determined by the Managing Member of our firm. The Managing Member of our firm receives any residual profit of the firm. Additionally, our financial professionals recommend investments in the affiliated advisor's mutual fund, which provides compensation to our affiliated investment advisory firm which is owned by the Managing Member and where one of our financial professionals is also an employee. Our financial professionals do not receive sales commissions of any kind.

Item 4. Do you or your financial professionals have legal or disciplinary history? No, we have no legal or disciplinary events to disclose. We encourage you to visit www.Investor.gov/CRS for a free and simple tool to research your financial professionals.

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

Item 5. Additional information – Form ADV Part 1 is used by investment advisors to register with the SEC and state securities authorities. Our ADV Part 2A can provide you with further information about our firm, representatives, services, products, fees, conflicts of interests, and other information about us that you will find useful. You may request a free copy of our ADVs by calling us at 913-239-0100. Our firm does not currently maintain a website. You may also access ADV Part 1, Part 2A, and Part 3-CRS at the SEC's IAPD website: https://www.adviserinfo.sec.gov/IAPD/default.aspx.

You may request up-to-date information and a copy of our Form ADV Part 3-CRS Relationship Summary by using the contact information above. The Form ADV Part 3-CRS Relationship Summary will be provided at no cost.

Conversation Starter: (i) Who is my primary contact person? (ii) Is he or she a representative of an investment advisor? (iii) Who can I talk to if I have concerns about how this person is treating me?