



Revolution Wealth LLC

Form CRS (Client Relationship Summary)

Introduction

Revolution Wealth LLC is registered with the **Virginia State Corporation Commission (SCC)** as an investment adviser and is a member of the **Financial Industry Regulatory Authority (FINRA)**. We are not registered with the Securities and Exchange Commission (SEC).

It's important to understand how investment advisory services differ from brokerage services—including how we're compensated and the standards we follow. To learn more, visit [Investor.gov/CRS](https://investor.gov/CRS) or brokercheck.finra.org.

What investment services and advice can you provide me?

We provide comprehensive wealth management services for retail investors, which may include:

- Financial and retirement planning
- Investment portfolio management
- Education and cash flow strategies
- Tax coordination and risk management

You may choose either **discretionary** or **non-discretionary** portfolio management:

- *Discretionary*: We make investment decisions on your behalf based on your goals and risk tolerance.
- *Non-discretionary*: We provide recommendations, but you make the final decision on each investment.

You can impose written restrictions on our discretionary authority, which must be approved by us. We may also recommend or select other investment advisers when appropriate. Minimum account sizes may apply to certain services.

Ask us:

“Given my financial situation, should I choose investment advisory services?”

“How do you select investments for my portfolio?”

“What experience and qualifications do you have?”

Refer to **Form ADV, Part 2A (Items 4 and 7)** for more detail.

What fees will I pay?

We charge an **asset-based fee**, typically a percentage of assets under management. **Fees are billed monthly in arrears**, meaning after the month’s services have been delivered.

We may also charge fixed or hourly fees for standalone financial planning or consulting services. In some cases, an upfront retainer may be required.

You may also pay additional costs such as:

- Custodial and account maintenance fees
- Brokerage or transaction fees
- Internal expenses of mutual funds, ETFs, or annuities
- Wire transfers, redemption fees, or other product-specific charges

Ask us:

“How do fees and costs affect my investment returns?”

“If I invest \$10,000, how much will go to fees and how much will be invested?”

Whether your portfolio gains or loses value, fees will still apply. Over time, fees reduce your total returns.

See **Form ADV, Part 2A (Item 5)** for full details on fees and billing.

What are your legal obligations to me as an investment adviser? Do you have conflicts of interest?

As a fiduciary, we are legally and ethically obligated to act in your **best interest** and to avoid placing our interests ahead of yours. However, potential conflicts may still arise.

For example, our team may also be licensed to offer insurance or tax services through affiliated entities, which may involve additional compensation. We disclose and manage these relationships to reduce potential conflicts.

Ask us:

“What conflicts of interest exist in your business, and how will you manage them?”

More information is available in **Form ADV, Part 2A (Items 10–12)**.

How do your financial professionals make money?

Our financial professionals receive a **salary and may earn discretionary bonuses**. Bonus amounts may be influenced by client service outcomes, firm performance, and business development success—creating a potential incentive to increase assets under management or offer additional services.

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

No. Visit [Investor.gov/CRS](https://investor.gov/CRS) or brokercheck.finra.org to research our firm and individual professionals.

Additional Information

For more details about our services or to request a copy of this Relationship Summary, please contact us:



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