

## Form CRS - Customer Relationship Summary

### Hassell Wealth Management, LLC

Hassell Wealth Management, LLC, 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 [www.Investor.gov/CRS](http://www.Investor.gov/CRS), which also provides educational materials about broker-dealers, investment advisers, and investing.

#### **What investment services and advice can you provide me?**

We offer general wealth management services to individual investors including discretionary investment management and financial planning services.

When providing investment management services, we not only make investment decisions but also implement these decisions and provide ongoing monitoring and reporting. We do not sell proprietary investment products or limit clients to certain types of investments. Investment management services are tailored to your individual needs. We do not require a minimum account size but reserve the right to accept or decline engagements.

When providing financial planning services, we provide advice and other strategic assistance in areas such as educational funding, retirement planning, estate planning, risk management, employee benefits planning, tax planning, etc. You decide whether or not to implement any financial planning recommendations. Financial planning engagements may be done as a one-time project or as part of an ongoing planning relationship.

**For additional information about the services we provide**, please see Item 4 of our Form ADV Part 2A Brochure at [www.hassellwealth.com](http://www.hassellwealth.com).

#### **Key questions to 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 providing investment management services, we charge an ongoing asset-based fee. Asset based fees create a conflict of interest in that the more an investor has in an account, the more the investor will pay in fees, giving the firm an incentive to encourage investors to increase assets in their accounts. Our fee is calculated and deducted directly from your account quarterly in advance. Our fee is separate from mutual fund or ETF expenses, taxes, and other fees charged by outside parties. In some engagements, client transaction costs are included in a custodian fee that our firm pays on behalf of clients.

When providing financial planning services, we charge a fixed fee upon completion that we quote in advance based on the complexity of the project. If you engage us for investment management services, we may offset all or a portion of the financial planning fee you have paid. Our financial planning fees are separate from any fees or expenses assessed by outside parties.

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 about the fees we charge, please see Item 5 of our Form ADV Part 2A Brochure and Item 4 of the Appendix at [www.hassellwealth.com](http://www.hassellwealth.com).

**Key questions to 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 affect the investment advice we provide you. Here are some examples to help you understand what this means.

Some firms earn incentives by using proprietary products in client accounts, some firms share revenues with outside managers when directing client business, and some buy and sell investments from their own inventory to their clients. We do not engage in any of these activities. We do however receive compensation from the client based on the amount of assets we manage for each client, therefore we may have an incentive to attract or retain more assets under our management. We also receive some benefits from our custodian in return for directing client business to them and the receipt of these benefits is a conflict of interest.

For additional information about our custodial arrangement, please see Item 12 of our Form ADV Part 2A Brochure at [www.hassellwealth.com](http://www.hassellwealth.com).

**Key questions to 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?**

Our financial professionals are compensated with salary and incentive compensation that is tied to retention of client assets with the firm and development of new client relationships. Our financial professionals do not receive economic benefits or other compensation from outside parties in connection with investment sales.

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

Yes. Visit [www.investor.gov/CRS](http://www.investor.gov/CRS) for a free and simple search tool to research us and our professionals.

**Key questions to ask your financial professional:**

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

**Where to go for additional information**

*Please visit our website at [www.hassellwealth.com](http://www.hassellwealth.com) or contact us at 985-868-9881 for a current copy of this summary, for our Form ADV Part 2 Brochure, or for additional information about our firm.*

**Key questions to 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?