

Part 3 of Form ADV – Infinitus Wealth Management LLC. – Relationship Summary

January, 2025

Introduction: Infinitus Wealth Management LLC. (Infinitus) is registered with the Tennessee Securities Division as an investment adviser. Registration with the Tennessee Securities Division does not imply a certain level of skill or training. Brokerage, investment advisory and financial planning services and fees differ, and it is important for you to understand the difference. 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.

What investment services and advice can we provide you? We offer investment advisory and financial planning services to retail investors. The services we offer to you include assistance with developing and designing an investment strategy with you to achieve your investment goals. We monitor your accounts on an ongoing basis and communicate with you periodically through telephone, email, and in person meetings. We offer advisory accounts for which we exercise discretion, i.e. discretionary accounts. A discretionary account allows us to buy and sell investments in your account, without asking you in advance. We do not limit the types of investments available to you. The minimum assets under management for our services is \$50,000 however this figure is negotiable at our discretion. For additional information about us and the services we offer, please refer to our Form ADV Part 2A.

Additional Questions to Ask

Ask our financial professionals these key questions about our investment services and accounts.

1. Given my financial situation, should I choose an investment advisory service? Why or why not?
2. How will you choose investments to recommend to me?
3. What is your relevant experience, including your licenses, education and other qualifications?
What do these qualifications mean?

What fees will I pay? Fees charged for our asset management services are charged based on a percentage of assets under management, billed in arrears (at the end of the billing period) on a monthly basis and calculated based on the fair market value of your account as of the last business day of the billing period. Fees are prorated (based on the number of days service is provided during the initial billing period) for your account opened at any time other than the beginning of the billing period. If asset management services are commenced in the middle of the billing period, then the prorated fee for that billing period will be billed in arrears at the end of that billing period. The asset management services continue until terminated by either party (i.e., Infinitus Wealth Management or you) by giving thirty (30) days written notice to the other party. Infinitus Wealth Management will prorate the final fee payment based on the number of days services are provided during the final period. The amount of client assets on the termination date will be used to determine the final fee payment.

Fees charged for our asset management services are negotiable based on the type of client, the complexity of the client's situation, the composition of the client's account (i.e., equities versus mutual funds), the potential for additional account deposits, the relationship of the client with the investment adviser representative, and the total amount of assets under management for the client.

Additionally, you may pay transaction-based fees when we buy and sell investments for you. These transaction-based fees are in addition to our monthly asset-based fee. The most common fees and costs applicable to retail investors include custodial fees, account maintenance fees, fees related to mutual funds, and other transactional fees and product-level fees. You will pay these fees to a custodian that holds your assets (called "custody"). 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 the fees and costs you are paying.

Amount of Assets under Management	Annual Fees
Less than \$1,000,000-----	1.00%
\$1,000,000 to \$4,999,999.99-----	0.95%
\$5,000,000 to 9,999,999.99-----	0.90%
\$10,000,000 or more-----	0.80%

Additional Questions to Ask

Ask our financial professionals these key questions about the impact of fees and costs on investments.

1. **Help me understand how these fees and costs might affect my investments.**
2. **If I give you \$500,000 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 to you have?

Infinitus Wealth Management has a fiduciary duty to act in your best interest and not put our interest ahead of yours.

Assets Under Management: As indicated previously, our fee is based on the value of assets under our management. Therefore, we may have an incentive to encourage you to increase the amount of assets in your account.

Proprietary or Personal Trading: We may employ the same investment strategies for our personal investment accounts as we do for your investment advisory accounts.

Additional Questions to Ask

Ask our financial professionals these key questions about conflicts of interests.

1. **How might your conflicts of interests affect me, and how will you address them?**

How do our financial professionals make money? Our financial professionals are compensated in the following ways: Cash compensation in the form of an annual salary.

Do we or our financial professionals have legal or disciplinary history? Our financial professionals have no legal or disciplinary history. Please visit Investor.gov/CRS for a free and simple search tool to research our firm and financial professionals.

Additional Questions to Ask

Ask our financial professionals these key questions about our disciplinary history.

1. **As a financial professional, do you have any disciplinary history?**
2. **If so, for what type of conduct?**

Additional Information

Copies of this Relationship Summary are available upon request. We encourage you to seek out additional information about our investments advisory services by contacting us at (330) 307-9396. Our Chief Compliance Officer, Erik Roberts, can be reached at then number above or at erik.roberts@infinituswealth.com.

Additional information regarding our firm and financial professionals can be found at www.infinituswealth.com, adviserinfo.sec.gov or investor.gov. A copy of firm's disclosure document, Form ADV, is available upon request.

Additional Questions to Ask

Ask our financial professionals these key questions about contact and complaints.

1. **Who is my primary contact person?**
2. **Is he or she a representative of an investment adviser or broker-dealer?**
3. **Who can I talk to if I have concerns about how this person is treating me?**