

## CLIENT RELATIONSHIP SUMMARY (CRS)

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### ITEM 1: INTRODUCTION

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**Accelerated Wealth Advisors, LLC (“AWA” or “Firm”)** is registered with the Securities and Exchange Commission (SEC) as an Investment Advisor. 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 [Investor.gov/CRS](https://investor.gov/CRS), which also provides educational materials about broker-dealers, investment advisors, and investing.

### ITEM 2: RELATIONSHIPS AND SERVICES

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

##### Investment Advisory Services

AWA’s customer base may consist of individuals, corporations, and other business entities. The Firm offers both discretionary and non-discretionary investment advice to our clients. The Firm may also offer financial planning services to its clients. The Firm’s advisory program is designed to provide you with the appropriate asset allocation, diversification, and risk characteristics consistent with your investment objectives and prudent investment advice. The Firm also currently offers various proprietary and non-proprietary model portfolios. In order for the Firm to use discretion, a client must accept such practice in writing. The Firm also offers alternative investments to select clients and does not use discretionary authority to invest in such investments on behalf of the client. The Firm has minimum account opening balances, which vary depending on the type of investments or portfolio being managed. The Firm reviews accounts on a regular basis, unless specifically agreed otherwise with the client(s). For additional information Please see the Firm’s ADV Part 2A, Items 4 and 7, which can be obtained from the Firm or found at <https://adviserinfo.sec.gov/firm/summary/170022> or [www.acceleratedwealth.com](http://www.acceleratedwealth.com).

### ITEM 3: FEES, COSTS, CONFLICTS, AND STANDARD OF CONDUCT

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#### What fees will I pay?

The annual Investment Advisor fee payable to the Firm will not exceed two percent (2.0%) of assets under management or advisement. The Firm may, however, negotiate a lower advisory fee, based upon certain criteria and in their sole discretion. The annual fee is exclusive of and in addition to brokerage commissions, transaction fees and other related costs and expenses that may be incurred in client accounts and that are payable to third parties. The Firm does not, however, receive any portion of these commissions, fees, or costs. The Firm will not be compensated on the basis of a share of capital gains upon or capital appreciation of the funds or any portion of the funds of the client. Certain individuals of the Firm are also licensed insurance agents for Accelerated Wealth, LLC, an affiliated insurance company. If you elect to implement the plan or buy insurance products through the Firm’s IARs, they may receive a commission from insurance sales, which includes life, long-term care insurance, accident and disability insurance and fixed annuities. These commissions are in addition to the regular Investment Advisory fees charged. This presents a conflict of interest and financial incentive to the extent that an IAR recommends the purchase of an insurance product to you, which results in a commission being paid to the IAR as an insurance agent as well as the regular Investment Advisory fee. This conflict is mitigated by the fact that the Firm, as well as the IARs, have a fiduciary responsibility to place the best interest of the client first and will act in accordance with that responsibility.

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 please see the Firm’s ADV Part 2A, Items 5 and 6, which can be found at <https://adviserinfo.sec.gov/firm/summary/170022> or from the Firm.

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### What are your legal obligations to me when providing recommendations as my broker-dealer or 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 Advisor, 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 recommendations, we provide you. The Firm addresses potential conflicts of interest by not utilizing products, programs and private alternative investments in discretionary accounts, by making full disclosure of such relationships to the relevant client(s) prior to making any recommendation and by adhering to written investment policies and strategies in recommending investments. Bill Walton, (CEO) and Chris Abeyta, (IAR) have an indirect financial interest in ASI Healthcare Capital Partners GP, LLC. ASI Capital, LLC is a manager of several pooled investment vehicles, the interests of which are privately offered pursuant to Regulation D of the Securities Act of 1933. ASI Healthcare Capital Partners GP, LLC is the general partner of the ASI Healthcare Capital Partners I, LP. A conflict of interest exists to the extent that the Firm's IARs may recommend an investment in one or more private investment funds managed by an affiliate of ASI Capital, LLC and or the fund in which ASI Healthcare Capital Partners GP, LLC is the general partner of due to Mr. Walton's and Mr. Abeyta's affiliation therewith. This conflict is mitigated by the fact that Mr. Walton and Mr. Abeyta, as well as the Firm, have a fiduciary responsibility to place the best interest of the client first and will act in accordance with that responsibility. In any matter requiring Mr. Walton's or Mr. Abeyta's vote, and in which any Accelerated Wealth Advisors, LLC client holds an investment, outside counsel or CCO of Accelerated Wealth Advisors, LLC will render an opinion as to whether there is a possible conflict of interest and in the event of a conflict, Mr. Walton and Mr. Abeyta will abstain from voting and submit the subject matter and notice of their abstention to the CCO of Accelerated Wealth Advisors, LLC. The Firm's primary custodian Charles Schwab ("Schwab") may provide some of these services itself. In other cases, it will arrange for third-party vendors to provide the services to us. Schwab may also discount or waive its fees for some of these services or pay all or a part of a third party's fees. We receive certain economic benefits from Schwab in the form of the support products and services it makes available to us and in the form of soft dollar compensation. These products and services, how they benefit us, and the related conflicts of interest are described in the Firm's ADV Part 2A. The availability to us of Schwab's products and services is not based on us giving particular investment advice, such as buying particular securities for our clients. For additional information please see the Firm's ADV Part 2A, particularly Items 5, 6, 10, 11 and 12 which can be found at <https://adviserinfo.sec.gov/firm/summary/170022> or from the Firm.

### How do your Financial Professionals make money?

All of the Investment Advisors Representatives receive a portion of the advisory fees generated from the accounts they service or receive an annual salary. This compensation is received regardless of the performance of the assets under management. This may create an incentive to recommend or purchase assets for client accounts that are riskier than what is in the client's best interest. This conflict is mitigated by the Firm's processes and procedures, which are undertaken by salaried individuals who do not receive any additional compensation based upon the products and services they review and/or approve.

### ITEM 4: DISCIPLINARY HISTORY

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### Do you or your Financial Professionals have a legal or disciplinary history?

Some of our Financial Professionals have a legal or disciplinary history. You may look at [FINRA BrokerCheck](#) or our ADV Part 2A Brochure for our disciplinary history. Also, please ask your Financial Professional if they have a disciplinary history and for what type of conduct. Please visit [Investor.gov/CRS](https://Investor.gov/CRS) for a free and simple search tool to research your Financial Professionals.

### ITEM 5: ADDITIONAL INFORMATION

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For additional information about our services, or if you would like up-to-date information or a copy of this disclosure, please contact Melissa Starr at 719-466-5631 or e-mail her at [melissas@acceleratedwealth.com](mailto:melissas@acceleratedwealth.com).