



THE ESTATE PLANNERS GROUP

The Estate Planners Group, LLC
March 28, 2024
FORM CRS Relationship Summary

The Estate Planners Group, LLC is registered with the Securities and Exchange Commission as an investment adviser. We provide advisory services, rather than brokerage services. Since the fees charged for investment advisory services differ from those charged for brokerage services, it is important for our clients to understand the differences. This document provides a summary of: (a) the services and fees we offer to “retail” investors, or individuals who purchase securities for their own personal accounts rather than for an organization, and (b) our fees.

Free and simple tools are available to research firms and financial professionals at 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 the following investment advisory services to retail investors: Investment Supervisory Services; Financial Consulting Services; Financial Planning; Informational Seminars.

Account Monitoring:

If you open an investment account with our firm, as part of our standard services we will monitor your investments on a daily basis.

Investment Authority:

We manage investment accounts on a discretionary basis, whereby we decide which investments to buy or sell for your account. You may limit our discretionary authority (for example, limiting the types of securities that can be purchased or sold for your account) by providing our firm with your restrictions and guidelines in writing. Upon request, we offer non-discretionary investment management services whereby we provide advice, but you ultimately decide which investments to buy and sell for your account.

Investment Offerings:

We use various investment styles, and our investment strategies are based on modern portfolio theory of diversification across non-correlated asset groups. The diversification process uses equities, mutual funds, bonds, and alternative investments in different companies in diverse industry sectors. Our services are not limited to a specific type of investment or product.

Account Minimums and Requirements:

We require a minimum account value of \$500,000 for advisory services, which may be waived at our discretion.

For more detailed information regarding our services, please review our Form ADV Part 2A (see Items 4, 7, 8) at: <https://adviserinfo.sec.gov/firm/summary/124418>

Additional Questions to Ask Your Financial Professional About Relationships and Services

- *“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?”

A summary of the principal fees and costs associated with engaging our firm for investment advisory services is included below.

Asset-Based Fees:

Payable quarterly in advance. Since the fees we receive are asset-based (i.e., based on the value of your account), we have an incentive to increase the assets in your account through investments or additional contributions.

Other Fees and Costs:

The asset-based fees are the only fees we charge for our investment management services. These fees do NOT include fees or other charges due to the broker-dealer/custodian, portfolio software, any third-party investment manager, or exchange-traded or mutual funds.

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. 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 more detailed information regarding our fees and costs, please refer to our Form ADV Part 2A (see Item 5) at: <https://adviserinfo.sec.gov/firm/summary/124418>

Additional Questions to Ask Your Financial Professional About Fees and Costs

- *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 can affect the investment advice we provide you. Here is an example to help you understand what this means: Our firm is under common control with Hamilton Asset Advisers LLC, manager of private pooled investment funds (“Funds”). You may, from time to time, be solicited to invest in one or more of these Funds, so long as you are qualified to invest in such fund or funds, and each proposed investment is in your best interests. We waive our management fees on our clients’ investments in these Funds. For more detailed information on what potential conflicts exist, please refer to our Form ADV Part 2A at: <https://adviserinfo.sec.gov/firm/summary/124418>

Additional Questions to Ask Your Financial Professional About Conflicts of Interest

- *How might your conflicts of interest affect me, and how will you address them?*

“How do your financial professionals make money?”

Our financial professionals servicing your account(s) are compensated in the form of a salary. Salaries are based on industry standard levels of responsibility and seniority.

“Do you or your financial professionals have a legal or disciplinary history?”

No, our firm and our financial professionals currently do not have any legal or disciplinary history to disclose. Visit www.investor.gov/CRS for a free and simple tool to research our firm and its financial professionals.

Additional Questions to Ask Your Financial Professional About Disciplinary History

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

Additional Questions to Ask Your Financial Professional About Contacts and Complaints

- *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?*

Additional information about our investment advisory services may be found at: www.epgnow.net. Request up-to-date information and a copy of our relationship summary by calling (215) 321-4410.