

West Wealth Group, LLC
March 29, 2024
Form CRS

West Wealth Group, LLC is registered with the Securities and Exchange Commission as an investment adviser and, as such, we provide advisory services rather than brokerage services. Brokerage and investment advisory services and fees differ and it is important for you, our client, to understand the differences. Additionally, 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 advisers, and investing. This document is a summary of the services and fees we offer to "retail" investors, which are natural persons who seek or receive services primarily for personal, family, or household purposes.

What investment services and advice can you provide me?

We offer the following investment advisory services to retail investors: Asset Management Services and Financial Planning & Consulting Services. We also provide educational seminars and webinars, which are free of charge.

Account Monitoring: If you open an investment account with our firm, as part of our standard service we will monitor your investments on a regular basis as agreed to by us as a part of our ongoing advisory service. This shall be done no less frequently than annually.

Investment Authority: We manage investment accounts on a **discretionary** basis whereby **we will 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.

Investment Offerings: We provide advice on various types of investments. Our services are not limited to a specific type of investment or product.

Account Minimums and Requirements: In general, we do not require a minimum dollar amount to open and maintain an advisory account.

Detailed information regarding our services, fees and other disclosures can be found in our Form ADV Part 2A Items 4, 7, and 8 by clicking this link <https://adviserinfo.sec.gov/firm/summary/316644>.

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?

The following summarizes the principal fees and costs associated with engaging our firm for advisory services.

- **Asset-Based Fees** - Since the fees we receive are asset-based (*i.e.*, based on the value of your account), we have an incentive to increase your account value which creates a conflict. Our annual asset-based fees range from 0.75% to 1.5% of assets under management, and are negotiable. Financial planning and consulting is provided at no charge for our asset management clients. These fees are billed monthly in advance and are based on the average daily balance for the preceding month. These fees are debited directly from your account(s).
- **Financial Planning & Consulting Hourly Fees** - Payable in advance at a rate of \$500 an hour for financial consulting for clients that do not utilize our asset management services.
- **Financial Planning & Consulting Fixed Fees** - Payable as invoiced and typically ranges from \$2,500 and \$15,000 for clients that do not utilize our asset management services.

Examples of the most common fees and costs applicable to our clients are:

- Custodian fees;
- Account maintenance fees;
- Fees related to mutual funds and exchange-traded funds;
- Transaction charges when purchasing or selling securities; and
- Other product-level fees associated with your investments.

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 detailed information, refer to our Form ADV Part 2A Items 5 and 6 by clicking this link <https://adviserinfo.sec.gov/firm/summary/316644>.

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

- Some financial professionals are licensed as independent insurance agents. They will earn commission-based compensation for selling insurance products. This compensation is separate and in addition to our advisory fees.
- Because our revenue is derived from asset-based fees, we have an incentive to grow your account as much as possible. This could cause us to take overly aggressive positions in conflict with your interests.

Key Questions to Ask Your Financial Professional

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

Refer to our Form ADV Part 2A by clicking this link <https://adviserinfo.sec.gov/firm/summary/316644> to help you understand what conflicts exist.

How do your financial professionals make money?

Financial professionals are paid a salary and/or a portion of the asset management fees you pay us. Managed accounts are not charged commissions, which eliminates that conflict for our financial professionals. However, the portion of compensation paid to our financial professionals based on asset management fees involves a conflict of interest because they have a financial incentive to refer clients to our firm.

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

No. Visit Investor.gov/CRS for a free and simple search tool to research our firm and our financial professionals.

Key Questions to Ask Your Financial Professional

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

You can find additional information about your investment advisory services and request a copy of the relationship summary at (949) 682-9105, extension 5 or click this link <https://adviserinfo.sec.gov/firm/summary/316644>.

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?**