Guide Wealth Management, LLC

March 2026

Form CRS – Client Relationship Summary

Introduction

Guide Wealth Management, LLC ("Adviser") is registered with the U.S. 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.

There are free and simple tools available to research firms and financial professionals at www.investor.gov/CRS which also provides educational materials about investment advisers, broker-dealers and investing.

What types of investment services and advice can you provide me?

We offer two levels of service to retail investors:

Wealth Management is our comprehensive service and includes investment management, financial planning, tax preparation, and tax representation for individuals and their businesses, as outlined in each client's advisory agreement.

Investment Management is a standalone portfolio management service for clients who do not require the full Wealth Management offering.

Most client accounts are managed on a discretionary basis, meaning we do not need to contact you before buying or selling in your account. We will conduct an internal review of your account at least quarterly and rebalance as needed.

Additional information about our advisory services is in Item 4 of our Firm Brochure which is available upon request or online at https://adviserinfo.sec.gov/.

Questions to Ask Us:

- *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 those qualifications mean?*

What fees and costs will I pay?

Fees and costs affect the value of your account over time.

Investment Management clients are charged an asset-based fee of up to 1.50% annually, applied on a tiered schedule based on account value and billed quarterly in advance.

Wealth Management clients are charged the same tiered asset-based fee, subject to a client-specific annual minimum fee that generally starts at $15,000 per year. You are charged the greater of the two they are not added together. Fees are negotiable.

Wealth Management clients also receive tax preparation services for one business entity through our affiliated entity, Guide Tax Management LLC (“GTM”), owned by Matthew Hague. Fees for that included business are credited against our advisory fee so your total cost is unchanged. If you have more than one business entity and engage GTM for additional business tax services, those additional engagements are billed by GTM separately and may represent costs beyond our advisory fee. The applicable treatment will be specified in your advisory agreement or a written disclosure provided before services begin.

Our fees do not include brokerage commissions, transaction fees, custodial charges, or the internal expense ratios of mutual funds and ETFs. Additional costs may arise from the use of margin.

Questions to Ask Us: Help me understand how these fees and costs will 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 does your firm make money and what conflicts of interest do you have?

When we act as your investment adviser, we have a fiduciary duty to act in your best interest. At the same time, the way we make money creates some conflicts with your interests you should be aware of:

Our fees are based on the value of your account, which creates an incentive to grow account values over time.

Matthew Hague, our Principal, also owns Guide Tax Management LLC, which provides tax services to GWM clients. For Wealth Management clients, tax services for one business entity are included and credited against our advisory fee. If you have additional business entities and engage GTM for those, GTM charges separately, which creates a financial incentive for us to recommend those additional services. We address this conflict by disclosing it in writing before any additional services are rendered and by ensuring you are never charged by both GWM and GTM for the same service.

Additional information about our conflicts of interest can be found in our Firm Brochure under Items 10 and 11 which is available upon request or online at https://adviserinfo.sec.gov/.

Questions to Ask Us: • How might your conflicts of interest affect me, and how will you address them?

How do your financial professionals make money?

Matthew Hague, our sole financial professional, is the principal owner of GWM and is compensated through the firm’s advisory fees paid directly by clients. He does not receive commissions, sales-based compensation, or compensation from any third party in connection with advisory services provided through GWM.

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

No. Our firm and financial professionals do not have any legal or disciplinary history.

Visit https://Investor.gov/CRS for a free and simple search tool to research our firm and our financial professionals.

Additional Information

You can find additional information about our firm's investment advisory services on the SEC's website at https://adviserinfo.sec.gov by searching CRD #264788. You may also contact our firm at 833-222-9435 or compliance@guidewealth.com with any questions.

Questions to Ask Us:

- *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?*