Engage Wealth Group, LLC | Form CRS – Customer Relationship Summary | June 29, 2026

Item 1: Introduction

As an investment adviser registered with the U.S. Securities and Exchange Commission ("SEC"), Engage Wealth Group, LLC ("us," "our," "we," or "EWG") offers investment advisory services to its clients. 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 www.investor.gov/CRS, which also provides educational materials about broker-dealers, investment advisers, and investing.

Item 2: What investment services and advice can you provide me?

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?"*

EWG provides investment advisory and wealth management services to individuals, including high net worth individuals, families, qualified retirement plans, foundations, charitable organizations, trusts, and estates on a fee-only basis. These services include investment management services where EWG manages client assets on a discretionary basis. We also offer financial planning services which may include financial, tax and estate planning, and next generation engagement and governance. Financial plans can be provided on a situational basis, an annual basis, or other cadence as described in your written agreement with us. Additionally, we offer consulting services to clients on a more limited basis, and we can provide advice on non-securities matters, such as insurance and/or real estate. At times, we may engage one or more experienced third-party money managers ("TPMM") to aid in the implementation of investment strategies for the client's portfolio or to manage a portion of the client's portfolio.

If you engage us for investment management services, we will meet with you to understand your current financial situation, existing resources, goals, time horizons, liquidity needs, and risk tolerance. We also inquire about our clients' prior investment history and family composition and background to gain a holistic viewpoint of the client's situation. Based on what we learn, we will develop the client's personalized profile and investment plan. We then create and manage a portfolio of investments that is regularly monitored, and if necessary, re-balanced to meet your changing needs, stated goals, and objectives. However, it is your responsibility to notify us of any changes in your financial situation. As our offerings are personalized, you will have the ability to leave standing instructions to us to refrain from investing in particular industries or to limit amounts invested in certain securities.

We have the ability to select assets and products from across many asset classes, including global and domestic equities, taxable and non-taxable fixed income, mutual funds, and ETFs. Overall investment strategies recommended to each client emphasize long-term ownership of a diversified portfolio of investments. The client's portfolio size, tax sensitivity, desire for simplicity, income needs, long-term wealth transfer objectives, and time horizon are all factors that influence EWG's investment decisions, and client portfolios with similar investment objectives and asset allocation goals may have differing investments. We provide investment management services on a discretionary basis, which means that you provide us with the authorization to direct securities transactions in your account(s), including determining which securities are bought and sold, the total amount to be bought or sold, and the timing of such transactions without obtaining prior consent from you.

We monitor client accounts under our management as part of a continuous and ongoing process. We will plan to meet annually with each client to conduct a formal review of the client's accounts. We further periodically review client investment accounts on an informal basis. For additional information, please refer to our Form ADV Part 2A Brochure ("Brochure"), especially Item 4 (Advisory Business), Item 7 (Types of Clients), Item 13 (Review of Accounts), and Item 16 (Investment Discretion).

Item 3: What fees will I pay?

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?"

We charge an annual advisory fee that is either (i) a flat retainer fee billed in arrears or (ii) a fee based on a percentage of the value of the assets under management, payable on a monthly basis in arrears based on the average daily balance of the account(s) from the previous month. Fees are assessed on all assets under management, including securities, cash, and money market balances. Fees are negotiable and will vary based on factors such as the size of the account, complexity of the portfolio, extent of activity in the account, and other related factors. The more assets there are in your account, the more you will pay in fees. Therefore, EWG has an incentive to encourage you to increase the assets in your account. While we do not require a minimum dollar amount to be managed by us, we do charge a minimum annual fee of $6,000, which may be waived at our discretion.

For stand-alone financial planning arrangements, we will negotiate our planning fees with you in advance and charge either a fixed fee or an hourly rate for services. Under our fixed fee arrangement, the fee will be based on factors including the complexity of your financial situation, deliverables, and recommendations will be implemented by us. Fixed fees for broad-based financial plans start at $6,000. Our hourly rate is $600, and we bill time spent meeting with you, researching and analyzing the agreed-upon issues, creating and documenting the plan, and communicating with you.

Our consulting fees are negotiable and are based on the extent and complexity of the consulting project. Our hourly rate is $600, with fees billed as services are rendered. For clients who opt for ongoing financial planning and advisory services without direct management of investments, we typically charge a flat rate of $1,500 to $50,000 per quarter, depending on complexity.

In addition to our fees, you will be responsible for other fees and expenses associated with the investment of your assets. These fees and expenses include brokerage and other transaction costs, fees, and taxes related to the purchase and sale of securities for your accounts, and any fees charged by custodians for holding your assets or transfers. Certain investments we select for clients that are managed or sponsored by third parties, such as mutual funds, private funds, ETFS, and SMAs incur separate fees and expenses for their management and operation that are not included in our fees. Client accounts utilizing a TPMM will pay an ongoing fee directly to the TPMM. For additional information, please refer to Item 5 (Fees and Compensation) of our Brochure.

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.

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?

Ask your financial professional: *"How might your conflicts of interest affect me, and how will you address them?"*

When we act as your investment adviser, we must 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 to you. Here are some examples to help you understand what this means.

EWG allows its supervised persons to purchase or sell the same securities that may be recommended to and purchased on behalf of clients. Owning the same securities that are recommended (purchase or sell) to clients presents a conflict of interest that, as fiduciaries, must be disclosed to clients and mitigated through internal policies and procedures. EWG has adopted a Code of Ethics pursuant to SEC rule 204A-1 to mitigate this conflict of interest.

We receive certain benefits from the custodians we recommend to you, such as pricing information and market data, computer software, and other technology that provide access to client account data, and related support. In evaluating whether to recommend that clients custody their assets at the custodians, we may consider the availability of some of the products, services and other arrangements as part of the total mix of factors we consider and not solely the nature, cost or quality of custody and brokerage services provided by such custodians.

For additional information, please refer to Item 11 (Code of Ethics, Participation or Interest in Client Transactions) and Item 12 (Brokerage Practices) of our Brochure.

How do your financial professionals make money?

Our financial professionals are compensated based on the revenue generated from advisory services, which is distributed in accordance with an agreement entered into with the firm or among the owners of the firm. Some of our financial professionals are paid a salary and a bonus based on the revenue generated from the advisory services they perform. Thus, our financial professionals have an incentive to encourage you to increase the assets in your account or solicit new business.

Item 4: Do you or your financial professionals have legal or disciplinary history?

Ask your financial professional: *"As a financial professional, do you have any disciplinary history? For what type of conduct?"*

No. For additional information, please visit www.investor.gov/CRS for a free and simple search tool to research EQG and our financial professionals.

Item 5: Additional Information

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?"*

For additional information about EWG's investment advisory services and to request a copy of our Brochure, please contact us at (847) 794-5000.