

Olympus Wealth Management, LLC
Form CRS Customer Relationship Summary
June 29, 2020

Olympus Wealth Management, LLC. (“OWM”) is an investment adviser registered with the U.S. Securities and Exchange Commission (“SEC”). Fees for brokerage and investment advisory services differ and it is important for you to understand those differences. Free and simple tools are available for you to research us, other firms and financial professionals at Investor.gov/CRS. At this site, you may also find important educational materials about broker-dealers, investment advisers and investing.

What investment services and advice can you provide me?

We offer investment advisory services to investors, like you. Our services include Investment Management, Financial Planning, and Multi-Family Office (MFO) services. Our approach to Financial Planning involves gathering information, analyzing scenarios, and tailoring a plan to your needs. We then help implement and monitor your plan. For Investment Management clients, we construct portfolios with investment vehicles that may include mutual funds, exchange-traded funds, and/or separately managed accounts. We also utilize other investment vehicles when appropriate. Within our MFO Services we provide or coordinate a range of services which can include consulting for your entire balance sheet (not just your liquid investments), private equity portfolios, complex wealth transfer strategies, bookkeeping, and bill pay services.

Ask your financial professional the following questions:

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?

As part of our investment management services, we monitor your account on an ongoing basis. We periodically re-balance accounts consistent with the account’s investment objectives and restrictions; implement investment strategies; and furnish reports concerning account activity, strategy, and performance.

We manage accounts on a discretionary or non-discretionary basis. Discretionary basis means our firm has authority to determine the type of securities bought and sold, the dollar amounts of the securities to be bought and sold and whether a client’s transaction should be combined with those of other clients and traded as a “block” without consulting you first. We maintain this discretion until it is revoked (*e.g.*, by termination). Non-discretionary basis means you make the ultimate decision regarding the purchase or sale of investments. The minimum fee that we will

charge for our investment management services is \$14,000 on an annual basis. This minimum can be waived at the discretion of our Firm.

More detailed information about our services and advice can be found in our Form ADV Part 2A disclosure brochure. For a copy contact us at (801) 449-9600 or go to www.adviserinfo.sec.gov.

What fees will I pay?

Our management fees typically range from 1% to .35% and can vary at the discretion of the firm and as stated in your advisory agreement. Our fee is billed on a pro-rata basis, monthly in arrears, based on the market value of your account the last day of the prior month. Investment Management Services can be terminated at any time by providing 30 days written notice.

Our Financial Planning and MFO Services are provided for a negotiated fee. We can charge an hourly, a negotiated flat fee, or an asset-based fee for MFO, and Financial Planning services. The fee charged is based on the scope of our engagement. For hourly agreements, the fee can be up to \$1,000 per hour. The fee will be detailed in the corresponding agreement. As fees are paid monthly in arrears, there are no pre-paid fees subject to refund. All MFO Services can be terminated at any time by providing 30 days written notice. Upon termination, any fees that are earned by us but not yet paid will be immediately due and payable.

You are responsible for paying additional fees and costs to third parties in connection with your account, including but not limited to: custodial fees, mutual fund related fees, wire fees, and any other transactional or product level fees. 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.

More detailed information about our fees and other costs associated with investing and account termination can be found in our Form ADV Part 2A disclosure brochure. For a copy contact us at (801) 449-9600 or go to www.adviserinfo.sec.gov.

Ask one of our financial professionals the following questions:

Help me understand how these fees and costs might affect my investments. If I give you \$1,000,000 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 a fiduciary duty 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. Due to the compensation we earn, a conflict with your interests is created. For example, because we earn more as the value of the account increases, we can be motivated to place your assets in a more aggressive or risky manner in order to inflate the portfolio value and earn higher compensation. To mitigate this conflict, we have adopted certain supervisory policies and procedures, as well as our Code of Ethics, which sets forth the professional and fiduciary standards that associated persons must follow. You should understand and ask us about this conflict because it can affect the investment advice we provide you.

Ask your financial professional:

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

We have no outside financial industry activities or financial industry affiliations. Information regarding the financial and outside business activities of our Investment Adviser Representatives can be found on the SEC's website at <https://adviserinfo.sec.gov/>

More detailed information about our conflicts of interest can be found in our Form ADV Part 2A disclosure brochure. For a copy contact us at (801) 449-9600 or go to www.adviserinfo.sec.gov.

How do your financial professionals make money?

Firm Principals Scott Bird, Matthew Krull, and Scott Poelman as owners in the firm, receive a base salary and share in earnings of the firm. Other Investment Advisor Representatives of the Firm earn a base salary and share in revenues of the firm.

Additional information about compensation arrangements for our professionals and related conflicts of interest are found in our Form(s) ADV Part 2B. Form ADV Part 2B for any of our Investment Adviser Representatives is available through us by email request at: 6985 Union Park Center, Suite 435 Cottonwood Heights, UT 84047 or by phone at (801) 449-9600.

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

No. Please go to www.Investor.gov/CRS for a free and simple search tool to research us and our financial professionals.

Ask your financial professional:

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

Additional Information

Additional information and a copy of this Form CRS can be found at www.adviserinfo.sec.gov by searching "Olympus Wealth Management" or by contacting us at 6985 Union Park Center, Suite 435 Cottonwood Heights, UT 84047 or by phone at (801) 449-9600.

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?