

Johnson Wealth Inc.
Customer Relationship Summary
 March 28, 2024

Introduction	<p>Johnson Wealth Inc. is a wholly owned subsidiary of Johnson Financial Group and registered with the 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. Free and simple tools are available to research firms and financial professionals at investor.gov/CRS, which also provides educational materials about broker-dealers, investment advisers, and investing.</p>
What investment services and advice can you provide me?	<p>We offer investment advisory services to retail investors, focusing on preparation of your financial plan and execution of investment strategies to help achieve the goals defined within your plan. Our standard services include a periodic review of your financial plan as well as regular monitoring of your investments to ensure your portfolio expresses changes in market conditions, asset prices, and your unique circumstances. Portfolio construction typically consists of investments in mutual funds and exchange traded funds. Where appropriate, we may invest your portfolio in individual stocks and bonds or provide access to separate account managers and private investments. These investments are limited to those that have been approved through our due diligence process. We do not offer proprietary investment products. When we purchase or sell investments for your portfolio, we typically act as your <i>discretionary</i> manager, meaning you provide us with the authority to make decisions for your portfolio without prior consultation or approval. Our financial planning and investment advisory services are subject to the minimum fees and account sizes disclosed in our standard fee schedule.</p> <p>For additional information, please see our Form ADV, Part 2A Brochure, Items 4, 5, 7, and 13.</p> <p>Conversation Starters. Ask your financial professional—</p> <ul style="list-style-type: none"> • 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?	<p>Our investment advisory services are subject to our standard fee schedule. We may negotiate fees based upon the amount and type of assets in your accounts, the level of service provided, and the complexity and scope of the assignment. Fees are most often <i>asset-based</i>, paid quarterly in advance, and directly deducted from your account. Since we charge <i>asset-based fees</i>, the more assets in your account, the more you will pay in fees, and we therefore have an incentive to encourage you to increase the assets in your account.</p> <p>Other fees and costs related to our investment advisory services include activity-based custodian and brokerage fees as well as asset-based fees for the custody and investment management services provided through our third-party managed account platform. For investments in mutual funds and exchange traded funds, you will indirectly pay your proportionate share of fund expenses, including investment management fees to the funds' investment advisers. Investments in private investment vehicles, such as hedge funds and private equity or credit funds, typically involve additional fees paid directly or indirectly at the fund level as well as third-party platform fees for access to the investments.</p> <p>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.</p> <p>For additional information, please see our Form ADV, Part 2A Brochure, Items 4, 5, and 7.</p>
	<p>Conversation Starters. Ask your financial professional—</p> <ul style="list-style-type: none"> • 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?

<p>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?</p>	<p>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 recommendations we provide you. Here are some examples to help you understand what this means.</p> <p>As a wholly owned subsidiary of Johnson Financial Group, a privately held financial services company, we are under common control with Johnson Bank, a Wisconsin state member bank. Considering this affiliation, our advisors are incented to understand your comprehensive financial needs and introduce you to other products and services at Johnson Bank.</p> <p>With respect to our investment advisory services, we have soft dollar arrangements with certain custodians. This means we have an incentive to process trades through these custodians because a percentage of your trading and brokerage costs is rebated back to us. We use this rebate to expand our access to research that broadly applies to the investment decisions we make for our clients.</p> <p>Conversation Starters. Ask your financial professional—</p> <ul style="list-style-type: none"> • How might your conflicts of interest affect me, and how will you address them? <p>For additional information, please see our Form ADV, Part 2A Brochure, Items 10, 12, 14, and 15.</p>
<p>How do your financial professionals make money?</p>	<p>Our advisors participate in a salary-based compensation plan which provides additional compensation based on annually established goals for attracting revenues to Johnson Wealth and the wealth management division of Johnson Bank. Our advisors also participate in the Johnson Financial Group sales referral incentive plan which pays participants for attracting clients to products and services offered by our affiliates.</p>
<p>Do your financial professionals have legal or disciplinary history?</p>	<p>Yes. Visit investor.gov/CRS for a free and simple search tool to research us and our financial professionals.</p> <p>Conversation Starters. Ask your financial professional—</p> <ul style="list-style-type: none"> • As a financial professional, do you have any disciplinary history? For what type of conduct?
<p>Additional Information</p>	<p>For additional information about our services, please visit our website at www.johnsonfinancialgroup.com. You can also request copies of our Form ADV Parts 1 and 2A at no additional charge by calling the number below or visiting the SEC’s website at https://adviserinfo.sec.gov/firm/summary/125557.</p> <p>If you would like additional, up-to-date information or a copy of this disclosure, please call 414.291.4500.</p> <p>Conversation Starters. Ask your financial professional—</p> <ul style="list-style-type: none"> • 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?