

Triad Wealth Partners, LLC
Form CRS Customer Relationship Summary
March 12, 2026

Triad Wealth Partners LLC (“we,” “our” or “us”) is 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](https://www.investor.gov/crs), which also provides educational materials about broker dealers, investment adviser, and investing.

What investment services and advice can you provide me?

The Firm provides advisory services through its Investment Adviser Representatives (“IARs”). IARs are independent contractors of the Firm. Through the Firm, IARs provide ongoing investment advisory and personal financial planning and consulting services to individuals, trusts, estates, charitable organizations, corporations and business entities. Investment advisory services are generally discretionary and offered for a fee based on assets under management as further described in the agreement with the client. In certain cases, IARs provide financial planning and consulting services for an additional fee. Additionally, The Firm operates a Turnkey Asset Management Platform (“TAMP”), providing certain investment, operational and administrative support services directly to independent registered investment advisers (“RIAs”), which in turn, RIAs use to service their respective clients (“end clients”). In a TAMP relationship, end clients typically work directly with their primary investment adviser (i.e., the RIA) to determine their investment needs. The RIA then engages Triad Wealth to provide support with certain functions of the RIA. Triad Wealth enters into a separate, written agreement with each RIA describing the specific investment, operational and/or administrative services provided by Triad Wealth. Triad Wealth also offers stand-alone financial planning and consulting services to clients. Financial planning and consulting services are non-discretionary in nature. **For additional information, please see our Form ADV, Part 2A Brochure, Items 4 and 7.**

Conversation Starters. 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?

Investment Advisory Fees

The structure and level of the advisory fee will vary by client based upon the services provided and other considerations deemed relevant by the Firm and its IARs but typically takes the form of a percentage of assets under management, ranging up to 2.00% per annum. Fees are billed in on a quarterly basis in advance, based upon the value of assets under management on the last day of the previous quarter.

Turnkey Asset Management Program Fees

The structure and level of the Firm’s fee for its services as a TAMP (the “Fee”) will vary by RIA based upon the services provided by the Firm but typically takes the form of a percentage of the RIA’s assets under management. The Fee is generally billed quarterly in advance, based upon the value of assets under management on the last day of the previous quarter.

Financial Planning and Consulting

Triad Wealth IAR’s typically charge a negotiable hourly or flat fee for financial planning and consulting services. The specific rate applicable to your engagement will be determined prior to the commencement of services based on our expectation of the complexity, time, research, and resources required to provide services to you, and/or other factors the Firm deems relevant. The fee applicable to your account shall be set forth in a written agreement.

Our fees are exclusive of other fees and expenses applicable to each client’s account, including brokerage commissions, banking fees, custodial fees, transaction fees and certain investment-related expenses. Our fees are exclusive of the fees and expenses charged by other advisers and investments products. **For additional information regarding applicable fees and expenses, please see our Form ADV Part 2A Brochure, Item 5. 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.

Conversation Starters. 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.

We are affiliated with an insurance agency/entity, Triad Partners, LLC. Many of our personnel are licensed insurance agents and are compensated for the sale of insurance-related products. Such personnel typically receive a commission for the sale of life insurance-related products. Such commissions are in addition to our advisory fees. This potential for additional compensation creates a conflict of interests because our personnel have a financial incentive to sell life insurance-related products to you.

We manage accounts with the same or similar investment strategy that are subject to different fee arrangements. This presents conflict of interest because we have a financial incentive to favor the accounts that pay higher fees when allocating limited investment opportunities.

We generally charge our fees on the basis of the amount of assets under management, which creates a financial incentive for us to encourage clients to increase the amount of asset in their accounts advised by us. **For additional information, please see** Form ADV, Part 2A brochure and other applicable documents.

Conversation Starters. Ask your financial professional – *How might your conflicts of interest affect me, and how will you address them?*

How do your financial professionals make money?

Individuals registered as our investment adviser representatives are compensated based on a percentage of the advisory fees payable to us by a client. Many of our advisors are licensed insurance agents and are compensated for the sale of insurance-related products, including to clients. Any such commission paid are in addition to the advisory fees paid by clients.

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

Yes, please visit Investor.gov/CRS for a free and simple search tool to research our firm and your financial professional.

Conversation Starters. Ask your financial professional – *As a financial professional, do you have any disciplinary history? For what type of conduct?*

Additional Information

For additional information about our services, including up-to-date information about the firm and/or a copy of this disclosure, please contact us, via phone at (785) 830-0000 or email to Dani.Hampton@triadwealthpartners.com.

Conversation Starters. 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?*