

Strategic Wealth Partners Group, LLC
Form CRS - Customer Relationship Summary

June 2020

<p>Item 1: Introduction</p>	<p>Strategic Wealth Partners Group, LLC is registered with the United States Securities and Exchange Commission as an investment adviser. Brokerage and investment advisory services and fees differ and it is important for you to understand the differences between them.</p> <p>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>
<p>Item 2: What investment services and advice can you provide me?</p> <p>Conversation Starters. Ask your financial professional</p> <p><i>“Given my financial situation, should I choose an investment advisory service? Why or why not?”</i></p> <p><i>“How will you choose investments to recommend to me?”</i></p> <p><i>“What is your relevant experience, including your licenses, education and other qualifications? What do these qualifications mean?”</i></p>	<p>We offer investment advisory services to retail investors. We provide personalized and holistic wealth and investment management services to individuals, including high net worth individuals. When providing wealth and investment management services, we seek to evaluate a client’s current financial situation and offer investment management services which are aligned with the client’s goals and circumstances. We typically allocate clients’ investment management assets among professionally managed investments such as mutual funds, exchange-traded funds (“ETFs”), external investment managers (“<i>External Managers</i>”), and invest other securities. Additionally, for certain clients who are financially qualified, we recommend private investments. If you utilize our investment management services on a discretionary basis, you will give us discretionary authority to trade the assets in your account through a limited power of attorney contained in your client agreement with us. Under a nondiscretionary arrangement, we will obtain your consent prior to placing the trades we recommend. We will monitor the holdings and performance of the investments we make for you on an ongoing basis and from time-to-time provide you with reports about the performance and holdings of your account. We do not impose a stated minimum fee or minimum portfolio value for starting and maintaining an investment management relationship, but we retain the discretion to decline any client engagement that is not a fit with our Firm. We generally impose a minimum portfolio size of \$1,000,000, though retain the discretion to accept clients with smaller portfolios. We also have a stated minimum fee of \$10,000 for investment management services.</p> <p>We also offer a broad range of financial planning and consulting services. For clients that meet an annual minimum wealth management fee, financial planning services are provided as part of our overall annual management fee. Basic planning services are offered as part of the wealth and investment management services we provide to clients. We also offer financial planning and consulting services to clients on a standalone basis to clients who seek more complex or specific services. When providing financial planning or consulting services on a standalone basis, we will not monitor the holdings and performance of your investments on an ongoing basis.</p> <p>We offer clients the option of obtaining certain financial solutions from unaffiliated third party financial institutions with the assistance of our affiliate, Focus Client Solutions (“FCS”).</p> <p>For additional information, please refer to our ADV Part 2A brochure, especially Item 4 (services), Item 7 (types of clients), Item 10 (financial affiliates), Item 13 (account monitoring) and Item 16 (discretionary authority).</p>
<p>Item 3: What fees will I pay?</p> <p>Conversation Starters. Ask your financial professional</p> <p><i>“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?”</i></p>	<p>For our wealth and investment management services, we charge a fee that is based on a percentage of the value of the assets in your managed portfolio account. The more assets there are in your account and the higher the value of those assets, the more you will pay in fees. For standalone financial planning or consulting services, we charge fixed fees.</p> <p>In addition to our fees, clients are responsible for the fees, expenses and charges imposed by third parties in connection with investment of their assets. These may include fees, expenses, charges and taxes imposed by broker-dealers, exchanges and custodians for trading assets in client accounts and safekeeping of those assets. Clients are additionally responsible for the fees and expenses of investments advised by third parties, such as third-party investment advisors, and of mutual funds and exchange traded funds. Such fees, expenses, commissions and charges are exclusive of and in addition to our fees. Fees and expenses clients are responsible for are described in greater detail under Item 5 of our Form ADV.</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>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><u>Conversation Starters. Ask your financial professional</u> <i>“How might your conflicts of interest affect me, and how will you address them?”</i></p>	<p>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:</p> <ul style="list-style-type: none"> • We receive client referrals from custodians we recommend for holding client assets. We also receive other benefits from custodians. Some of these benefits assist us with managing and administering client accounts, while other benefits help us to manage and grow our business. The Firm’s receipt of economic benefits from a <i>Financial Institution</i> creates a conflict of interest since these benefits has the potential to influence the Firm’s choice of one <i>Financial Institution</i> over another that does not furnish similar software, systems support, or services. • We have recommended, and will in the future recommend, that certain clients invest in products or investment vehicles managed and/or sponsored directly by KKR or one of its affiliates, who have an ownership interest in our parent company. Any fees charged by such Owner-Affiliated Funds will be paid directly or indirectly to KKR and/or its affiliates. Although SWP will only recommend such investments if it believes that they are in the best interests of clients, it is nonetheless possible that this conflict of interest might influence SWP’s advice, consciously or unconsciously. • In a few cases, external managers we recommend are clients of SWP. <p>For additional information about our conflicts and how we address them, please refer to Item 10, Item 12 and Item 14 of our Form ADV brochure.</p>
<p>How do your financial professionals make money?</p>	<p>Our Firm’s financial professionals are compensated through salary and bonus or a share of the Firm’s profits. A portion of that compensation is correlated to the amount of client assets they service, the revenue our Firm earns from the financial professional’s services and/or whether the financial professional has been successful in increasing amount of client assets under the Firm’s management. Compensation of our Firm’s financial professionals is unrelated to the type of product client assets are invested in.</p>
<p>Item 4: Do you or your financial professionals have legal or disciplinary history?</p>	<p>No. You can go to Investor.gov/CRS for free and simple search tool to research our firm and our firm’s financial professionals.</p> <p><u>Conversation Starters. Ask your financial professional</u> <i>“As a financial professional, do you have any disciplinary history? For what type of conduct?”</i></p>
<p>Item 5: Additional Information</p>	<p>For additional information about our investment advisory services, and to request a copy of Form CRS, please contact us at (224) 632-1600 or by email at info@stratwealth.com.</p> <p><u>Conversation Starters. Ask your financial professional</u> <i>“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?”</i></p>