Capital Design Private Wealth LLC
Form CRS - Relationship Summary
March 2026

Capital Design Private Wealth LLC is registered with the 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. 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.

What investment services and advice can you provide me?

We offer investment advisory services to retail investors. Our services include Investment Management Services and Financial Planning Services. We also offer a three-tiered service model. The first tier is financial planning and advice only and does not include investment management; the second tier is financial planning and advice but with an option for non-discretionary investment management. The third tier combines these two tiers and includes discretionary investment management services.

Monitoring:
Under our investment management services, your investment accounts will be monitored and reviewed regularly on at least a quarterly basis by our firm. We will provide advice to you regarding the investments and allocation of your accounts to ensure they are positioned appropriately based on your goals and objectives.

If you are only engaging our firm in financial planning services, we will work with you to review your held away investment accounts that we provide advice to you on but will not be monitoring or reviewing those held away investment accounts, unless otherwise agreed upon as part of your financial planning engagement.

Investment Authority:
Through our Investment Management Services, we maintain discretionary authority with respect to the purchase and sale of securities in your accounts managed by our firm. We do not require your prior authorization before placing trades in your account(s). If non-discretionary investment management is utilized, as described above, your approval for each trade is necessary before it is executed.

Limited Investment Offerings:
We do not offer or have proprietary products or limit our advice to a menu of products or to only certain types of investments.

Account Minimums and other Requirements:
There are no requirements for retail investors to open or maintain an account or establish a relationship.

For **Additional Information** regarding services we make available to you, please review Item 4 of our Form ADV Part 2A.

Ask your Adviser:
1. ***"Given my financial situation, should I choose an investment advisory service? Why or why not?"***
2. ***"How will you choose investments to recommend to me?"***
3. ***"What is your relevant experience, including your licenses, education, and other qualifications? What do these qualifications mean?"***

What fees will I pay?

The amount of fees you pay to our firm and the frequency with which you are billed depends on the services being provided. For investment management services, we will deduct fees directly from your managed account (asset-based fees) on a monthly basis. It is a breakpoint fee schedule ranging from 0.5% to 1.25%. For financial planning services, we charge an

upfront fee for the development and delivery of a financial plan. Our three-tiered advisory service model starts at $175 per month or, for the third tier, an asset management fee that is within the range mentioned above.

We are paid for investment management services based on a percentage of your managed account value. Therefore, the more assets there are in your advisory account, the more you will pay in fees, and we therefore have an incentive to encourage you to increase the assets in your account. This is a conflict of interest. However, we mitigate this by ensuring all recommendations and investment decisions we make are in your best interest.

Our fees are exclusive of brokerage commissions, transaction fees, and other related costs and expenses which you may incur. Additional fees you may pay include certain charges imposed by custodians such as custodial fees, deferred sales charges, or other fees and taxes on brokerage accounts and securities transactions. Mutual fund and exchange-traded funds also charge internal management fees, which are disclosed in a fund's prospectus.

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.

Ask your Adviser: "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."

How do your financial professionals make money?

Our financial professionals are compensated on a salary basis and are not paid commission or other compensation based on the amount of the business generated from their work.

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

No. You can visit Investor.gov/CRS for a free and simple search tool to research us and our financial professionals.

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

For additional information about our services, visit our website https://www.capitaldesignpw.com. If you would like additional, up-to-date information or a copy of this disclosure, please call 603-610-8290.

Ask your Adviser: 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?