**Client Relationship Summary**
**Inman Jager Wealth Management, LLC (CRD# 329603)**

## Introduction

Our firm, Inman Jager Wealth Management, LLC is registered as an investment advisor with the U.S. Securities and Exchange Commission. 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 advisors, and investing.

## Relationships and Services

| What investment services and advice can you provide me? |
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| **Services:** We offer investment advisory services to retail investors. These services include wealth management which is a combination of financial planning and investment management. Financial planning services may also be provided as a standalone service. We work closely with you to identify your investment goals and objectives, as well as risk tolerance and financial situation, in order to develop an investment approach. |
| **Accounts, Investments, and Monitoring:** We provide services to individuals, high net worth individuals, families, trusts, and estates. We primarily utilize individual stocks, exchange-traded funds ("ETFs"), and individual bonds in constructing portfolios. We may also use mutual funds, options, closed-end funds, and/or other types of investments, as appropriate. We do not make available or offer advice with respect to only proprietary products or a limited menu of products or types of investments. As part of our standard services, we monitor portfolios and securities in accounts on a regular and continuous basis. We also offer to meet with you at least annually or more frequently, depending on your needs. |
| **Investment Authority:** We typically provide our services on a perpetual and discretionary basis. We execute investment recommendations in accordance with your investment objectives without your prior approval of each specific transaction. Our engagement will continue until you notify us otherwise in writing. We also offer our services on a non-discretionary basis, which means we are required to obtain your consent prior to executing any trades in your accounts. Therefore you will make the ultimate decision regarding the purchase or sale of investments in your accounts. However, we may not be able to aggregate your order with other client orders under this type of authority, and therefore, you may not receive the same price as other clients. |
| **Account Minimums and Other Requirements:** We generally require a minimum relationship size of $500,000, which may be waived or reduced at our sole discretion. |
| **Additional Information:** For more detailed information on our relationships and services, please see Item 4 – Advisory Services, Item 13 – Review of Accounts, and Item 7 – Types of Clients of our Form ADV Part 2A available via our firm's Investment Adviser Public Disclosure Page. |
| **Conversation Starters:** *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?* |

## Fees, Costs, Conflicts, and Standard of Conduct

| What fees will I pay? |
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| **Asset-Based Fees:** Our asset-based fees for wealth management services range up to 1.00% annually. This fee is collected on a quarterly basis and calculated as a percentage of the value of the cash and investments in your account[s] that we manage. This presents a conflict of interest as we are financially incentivized to encourage you to place more assets in your advisory account as you will pay more in advisory fees. |
| **Hourly Fees:** Our hourly fees for standalone financial planning services are at a rate of $300 per hour. Hourly fees may be invoiced up to fifty percent (50%) of the expected total fee upon execution of the financial planning agreement, with the balance invoiced and due upon completion of the agreed upon deliverable[s]. Hourly fees are negotiable based on the nature and complexity of the services to be provided and the overall relationship with us. We provide you with an estimate for total hours and overall costs prior to engaging us for these services. |
| **Other Fees and Costs:** In addition to our advisory fee, you will also be responsible for custody fees, account administrative fees, fees and expenses related to mutual funds and exchange-traded funds, and applicable securities transaction fees. |
| **Additional Information: 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. For more detailed information on our fees, please see Item 5 – Fees and Compensation of our Form ADV Part 2A available via our firm's **Investment Adviser Public Disclosure Page**.

**Conversation Starters**: *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 advisor? How else does your firm make money, and what conflicts of interest do you have?**

*When we act as your investment advisor*, we have to act in your best interest and not put our interests 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 is an example to help you understand what this means.

Some of our financial professionals are licensed as insurance agents. In addition to our services, your financial professional will offer you insurance products in their separate capacity as an insurance agent. The fees charged for the implementation of insurance products are separate from our advisory fees, where your financial professional will earn commission-based compensation for the implementation of an insurance product. Therefore, there is a financial incentive to recommend that you implement insurance through our financial professionals.

We will recommend that you open your account with a specific custodian, where we maintain an institutional relationship and receive economic benefits. The receipt of economic benefits presents a conflict of interest and can influence our recommendation of the custodian to you. However, you ultimately decide where to open your accounts. Choosing a different custodian may result in the loss of quality of service and/or the ability to obtain favorable prices.

**Additional Information:** For more detailed information, please see Item 10 – Financial Industry Activities and Affiliations, Item 12 – Brokerage Practices, and Item 14 – Client Referrals and Other Compensation of our Form ADV Part 2A, available via our firm's **Investment Adviser Public Disclosure Page**.

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

**How do your financial professionals make money?**

Our financial professionals are compensated based on the revenue generated from advisory services, which is distributed in accordance with our partnership agreement. This means our financial professionals have an incentive to increase the asset size in the relationship or solicit new business, taking time away from the day-to-day servicing of existing clients.

## Disciplinary History

**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 our firm and our financial professionals.

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

## Additional Information

You can find additional information about our investment advisory services by viewing our Form ADV Part 2A, available via our firm's **Investment Adviser Public Disclosure Page** or by visiting https://inmanjagerwm.com. You can request up-to-date information and a copy of our Client Relationship Summary by contacting us at (305) 876-6903.

**Conversation Starters:** *Who is my primary contact person? Is he or she a representative of an investment advisor? Who can I talk to if I have concerns about how this person is treating me?*

## Exhibit

**Material Changes**

The following material changes have been made to our Form CRS:

- We no longer utilize private equity, venture capital, or real estate investment trusts ("REITs") in constructing portfolios.

February 27, 2026