

*LongView Wealth Management, Inc.
Relationship Summary – Form CRS*

Is an Investment Advisory Account Right for You?

There are different ways you can get help with your investments. You should carefully consider which types of accounts/services are right for you. **Depending on your needs and investment objectives, we can provide you with services in an, investment advisory account.** This document gives a summary of the types of services we provide and how you pay. Please ask for more information. There are suggested questions on page 2.

<i>Investment Adviser Services Advisory Accounts</i>
Types of Relationships and Services. <i>Our accounts and services.</i>
<ul style="list-style-type: none"> ● LongView Wealth Management, Inc. (“Firm” or “LongView”) provides investment advisory services (including Financial Planning and Asset Allocation Services, Asset management, and Analysis, Recommendation and Monitoring of Third-Party Managed Programs) as well as various types of consulting geared toward individuals, including high net worth (i.e. clients with a net worth of \$2,000,000), pension and profit-sharing plans, and corporations or other businesses. (“Clients”). In addition, LongView manages segregated portfolios for its Clients. ● If you open an advisory account, you will pay an on-going asset-based fee for our services. We will offer you advice on a regular basis. We will discuss your investment goals with you, help to design a strategy to achieve your investment goals, and regularly monitor your account. ● You can choose an account that allows us to buy and sell investments in your account without asking you in advance (a “discretionary account”) or we may give you advice and you decide what investments to buy and sell (a “non-discretionary account”). ● LongView offers several wrap fee programs: CMAP (Cambridge Managed Account Platform) and the LongView Wealth Management Program. Additionally, LongView offers a wrap program sponsored by Envestnet referred to as the Separately Managed Accounts Solution (SMA), Unified Managed Accounts Solution (UMA), Advisor as Portfolio Manager Solution, and Fund Strategist Portfolios Program. As further explained below, in a wrap fee program, clients pay a single, wrap fee instead of paying an advisory fee to LongView and all the transaction-related fees and other costs. Clients may establish an account through Envestnet and engage LongView to manage their account on a discretionary basis. The Envestnet Program is available as both Wrap and Non wrap program. ● LongView primarily uses open-ended mutual funds, ETF’s, stocks, bonds and insurance products. Our investment advice will cover a limited selection of investments. Other firms could provide advice on a wider range of choices, some of which might have lower costs. ● LongView’s Advisory Representatives engage as the portfolio managers in the CMAP and LongView Wealth Management Program. Additionally, LongView’s Advisory Representatives engage as portfolio managers on the Envestnet Unified Managed Accounts Solution (UMA) and as Advisor Portfolio Manager Solution programs. The wrap fee will be allocated by the program sponsor, LongView and to your Advisory Representative. ● Regarding retirement planning, LongView provides investment advisory services to employee-directed pension, profit sharing and 401(k) plans through a collective investment trust fund established and maintained by First Mercantile Trust Company (“First Mercantile”).
Our Obligations to You. <i>We must abide by certain laws and regulations in our interactions with you.</i>
<ul style="list-style-type: none"> ● We are held to a fiduciary standard that covers our entire investment advisory relationship with you. For example, we are required to monitor your portfolio, investment strategy and investments on an ongoing basis. ● Our interests can conflict with your interests. We must eliminate these conflicts or tell you about them in a way you can understand, so that you can decide whether or not to agree to them.
Fees and Costs. <i>Fees and costs affect the value of your account over time. Please ask your financial professional to give you personalized information on the fees and costs that you will pay.</i>
<ul style="list-style-type: none"> ● <i>Asset-based fees.</i> The Firm typically has a minimum account size of \$25,000 (cash or securities) for the CMAP Program and \$10,000 for the Envestnet Program. However, under certain circumstances, LongView may waive the minimum account size requirement. Such circumstances may include but not be limited to additional assets will soon be deposited or you have other accounts under management with LongView. ● Advisory fees are charged on a quarterly basis in advance or in arrears, depending on the Advisory Representative and as negotiated with the client. Quarterly periods can be on a calendar year basis or every three months starting on cycle as agreed between client and Advisory Representative. If a client relationship is established or closed during a quarterly period the client will be charged a prorated portion of the fee for the quarter. In cases where fees are charged in advance, the initial fee will be based on the value of the account upon establishment and will be prorated based on the number of days remaining in the quarterly period. In cases where the fee is charged in arrears, the initial fee will be a prorated fee based on the number of days the account was under management and based on the value of the account as of the last business day of the quarter. Thereafter the fees will be calculated based on the value of the account on the last business day of the just completed quarterly period. A set-up fee not to exceed one percent (1%) of the initial account value may be charged. The set-up fee will be billed in full along with the first quarter fee and is negotiable. ● Client’s advisory fee for the Envestnet Programs will consist of LongView’s fee, an Envestnet Program fee and fees for any of the managers or subadvisors selected to manage a portion of the client’s account. The total fee for any program will not exceed 2.50%. LongView’s portion of the total

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fee will not exceed 1.25%. The difference between the total fee paid by the client less LongView’s fee is paid to Envestnet to cover the Program fee and to the managers and subadvisors on client’s account.

- The standard annual management fee (“account fee”) schedule for CAAP may change but a sample is listed below. Accounts balances for the first \$250,000 get charged 1.90%; the next \$250,000 get charged 1.75%; the next \$500,000 get charged 1.55%; and any amount above \$1,000,000 get charged 1.25%. Premier CAAP accounts’ annual management fee utilizes either the tiered fee schedule or a flat fee not to exceed 1.90%. The account fee is a maximum combined fee charged to client and shared by LongView and the Advisory Representative of record.
- In connection with CMAP and LongView Wealth Management Program fees are negotiable and are not based on a share of capital gains or capital appreciation of the funds or any portion of the funds. Fees vary from client-to-client and are detailed in the Exhibit Page of the Client Agreement provided to the client. The CMAP Program is offered as a wrap program. A wrap program is where the client will pay one fee and the fee will cover LongView’s advisory fee and any transaction charges.
- Advisory Representatives can choose to aggregate all of a client’s managed accounts together to determine the fee breakpoint based on the schedule. Thus, all accounts will pay the same fee. Alternatively, Advisory Representatives can choose to charge a tiered fee which will charge a decreasing fee as aggregated account balances reach pre-defined levels. Sample of LongView Asset Management Program Fees may be a flat fee based on the value of the client’s managed portfolio or per account size or may be tiered. Clients on a tiered fee schedule will pay a fee based on each level outlined above (e.g. a \$1,000,000 account will pay up to 1.75% on the first \$100,000, 1.50% on the next \$150,000, 1.25% on the next \$250,000 and 1.20% on the remaining \$500,000).
- Initial Financial Planning and Periodic Financial Planning Services can be charged as follows: (a) minimum fees are \$1,000 for inclusive planning and \$500 for limited areas of concern and (b) miscellaneous advice is up to \$500 per planner hour billed monthly. Fixed fees will not exceed \$15,000. Actual fees are based upon the services requested by the client, the complexity of the client’s situation, and the amount of time required to provide the services. Further, advisory fees vary based on the Advisory Representative and their experience. Therefore, clients are advised that certain Advisory Representatives of LongView charge more or less than the fee quoted to the client.
- Asset allocation services are charged based on one of the options (Option A or Option B) disclosed below and selected by the client. Option A –The annual fee will be determined based on a percentage of the value of the account for which monitoring, and asset allocation services are being provided and divided by four. The fee is paid quarterly in advance in equal installments. The annual fee will be adjusted each quarter based on the value of the account on the last business day prior to quarter end. Option B –Flat Fee - A flat fee not to exceed \$15,000.
- Regarding divorce planning, Client agrees to pay LongView a retainer upon the execution of the Divorce Planning Services Agreement. Generally, the retainer is \$2,500. Compensation to LongView will be at a rate up to four hundred (\$400) dollars per hour for Advisory Representative’s services and one hundred fifty (\$150) dollars per hour for administrative time. Hourly fees are negotiable.

Conflicts of Interest. *We benefit from the services we provide to you.*

- The use of wrap fee programs lead to a number of conflicts of interest for LongView as it will be motivated to avoid transactional costs by reducing the trading in wrap accounts or limiting it to no-transaction fee funds only.
- LongView utilizes a wrap fee program known as the Cambridge Asset Allocation Program (“CAAP”). The Investment Adviser Representatives (“IRAs”) of LongView act in a solicitor capacity. This creates a conflict of interest for the IRAs as they are incentivized to solicit prospective clients to participate in CAAP because of their affiliation with Cambridge and not because it is in the client’s best interest.

Additional Information. *We encourage you to seek out additional information.*

- Do you or your financial professionals have legal or disciplinary history? Yes. Visit Investor.gov/CRS for a free and simple search tool to research us and our financial professionals
- LongView utilizes an investment management program through Cambridge Investment Research, Inc. (“Cambridge”), registered broker-dealer, member Financial Industry Regulatory Authority (“FINRA”), and Securities Investor Protection Corporation (“SIPC”), called Cambridge Managed Account Program (“CMAP”). Accounts are custodied, by selection of client and LongView, at Pershing, LLC (“Pershing”) or National Financial Services, LLC (“NFS”), both broker-dealers and members of the New York Stock Exchange (“NYSE”). Clients should be aware that by using Pershing or NFS, client may pay higher account-related fees and execution charges than if LongView had selected another clearing firm. There is no affiliation between LongView and Pershing and NFS.
- For additional information about our services, visit Investor.gov, our website (<https://www.longviewwealthmanagement.com/>), and your account agreement. For additional information on advisory services, see our Form ADV brochure on IAPD, on Investor.gov, or on our website (<https://reports.adviserinfo.sec.gov/reports/ADV/136214/PDF/136214.pdf>) and any brochure supplement your financial professional provides. To report a problem to the SEC, visit Investor.gov or call the SEC’s toll-free investor line at (800) 732-0330.

Key Questions to Ask. *Ask our financial professionals these key questions about our investment services and accounts.*

1. How much would I expect to pay per year for an advisory account?
2. What additional costs should I expect in connection with my account?
3. What are the most common conflicts of interest in your advisory accounts?