myCIO Wealth Partners, LLC – Form CRS – Customer Relationship Summary – July 31, 2026

Item 1. Introduction	myCIO Wealth Partners, LLC ("myCIO") 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, which also provides educational materials about broker-dealers, investment advisers, and investing.
Item 2. Relationships and Services	**What investment services and advice can you provide me?** We offer investment advisory services to retail and institutional investors, including discretionary and non-discretionary investment management, financial planning and related consulting services, and tax preparation services. Our advice is holistic, broadly covering each client's financial situation, and our investment recommendations most often involve mutual funds and/or exchange traded funds, private investment funds, non-traded / non-public REITs, sub-advisors, and independent investment managers. On a limited basis, we may recommend various individual equity (stocks), debt (bonds), and/or other fixed income securities. **Monitoring** We utilize various analytical frameworks to determine which investment strategies best serve our clients' needs. We use this approach to complement our one-on-one discussions which address your long-term investment objectives, risk tolerance, and any liquidity needs. We regularly monitor and advise on clients' investment portfolios on an ongoing basis as part of our standard services. **Investment Authority** Our clients typically retain discretionary authority over their accounts (i.e., myCIO typically provides non-discretionary services), and accordingly, such clients make the ultimate decision regarding the purchase and/or sale of any investments that we may recommend. However, in some limited instances, our clients may grant us discretionary authority to manage their accounts, which means we can buy and sell securities on behalf of those clients without seeking permission on a trade-by-trade basis. This discretionary authority, when granted, may be restricted by limitations set forth by clients in their investment advisory agreements. **Limited Investment Offering** Investment advice offered to clients is not limited to particular products or types of investments, although we generally do not provide recommendations with respect to the direct purchase and sale of individual (non-pooled) securities. **Account Minimums and Other Requirements** We generally require a minimum of $1,000,000 of investible assets for investment advisory services. Assets of family members may be aggregated for the purposes of meeting this minimum. We may waive or reduce the minimum asset amount in our sole discretion. **More Additional information** about myCIO services is available on Part 2A of our Form ADV, which is available at https://adviserinfo.sec.gov/firm/summary/134436. ***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?**
Item 3. Fees, Costs, Conflicts, and Standard of Conduct	**A. What fees will I pay?** myCIO charges clients an investment management fee that is based on the value of each client's assets under management. Fees are negotiable and range up to 0.50% annually, depending on the size and complexity of each client's accounts. Fees are charged quarterly in advance, based on account values at the start of each quarter. Our firm's fees generally increase as client accounts grow, so we have an incentive to encourage our clients to increase the amount of assets in the accounts that are under our management. Alternatively, at a client's request, we may perform investment management services on a fixed fee basis generally ranging from $10,000 to $300,000. myCIO also charges fees to clients who have contracted for certain specialized services, such as financial planning, estate planning, insurance planning, and/or tax preparation. Fees for such services are assessed on a fixed or hourly basis. myCIO also receives administrative fees for managing operations of certain affiliated private funds it operates and may recommend to retail investor clients. We retain discretion to negotiate any fees with clients. Additional

	information about myCIO's fees are included in Item 5 of Part 2A of Form ADV, available at https://adviserinfo.sec.gov/firm/summary/134436. In addition to myCIO's investment management fees, clients bear transaction fees when we buy or sell investments. Clients also pay fees to the broker-dealer or bank that maintains each account (called "custody" fees). Our firm often selects and purchases mutual funds and exchange traded funds for clients' portfolios. Such investment vehicles pay their own management, transaction, and administrative fees and expenses, and those fees and expenses are indirectly borne by the investors in those vehicles, including our clients. **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 Starter*.** 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?**
Item 3. Fees, Costs, Conflicts, and Standard of Conduct	**B. 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 to you. Here are some examples to help you understand what this means. • We manage accounts for multiple clients, and we allocate our time based on each client's needs. Our firm earns more as we expand our client base and grow our assets under management, and we seek to balance our staffing with the individualized needs of each client. • We are affiliated with several private investment funds that we operate as an administrator. myCIO will receive additional administrative fees to the extent a client chooses to invest in these funds. Our clients are under no obligation to consider or make an investment in such funds. ***Conversation Starter.*** Ask your financial professional— • **How might your conflicts of interest affect me, and how will you address them?** **More Additional information** about conflicts of interest between myCIO and its clients is available on Part 2 of our Form ADV, which is available at https://adviserinfo.sec.gov/firm/summary/134436. **How do your financial professionals make money?** myCIO's financial professionals receive a salary and may receive a discretionary bonus. Compensation is set with the intention of attracting and retaining highly qualified professionals. Compensation is based on a variety of factors, including the number, value and complexity of accounts under management, the performance of those accounts, and client satisfaction and retention.
Item 4. Disciplinary History	**Do you or your financial professionals have legal or disciplinary history?** • No for the firm. • Yes for one of our financial professionals. Visit Investor.gov/CRS for a free and simple search tool to research us and our financial professionals. ***Conversation Starter.*** Ask your financial professional— • **As a financial professional, do you have any disciplinary history? For what type of conduct?**
Item 5. Additional Information	***Additional information about our services*** can be found at https://adviserinfo.sec.gov/firm/summary/134436. If you have any questions about the contents of this brochure or would like to request a copy of this relationship summary, please contact Julie Gibson at 267-295-2280. ***Conversation Starter*.** 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?**