# Maxele Advisors, LLC

## March 31, 2026

## Customer Relationship Summary Form CRS

This is the Client Relationship Summary (CRS) of Maxele Advisors, LLC, an SEC-Registered Investment Adviser. It is important for clients to understand the differences in fees and services of Investment Advisors and Brokerages. Please go to Investor.gov/CRS for research firms and financial professionals, which also includes educational information about broker-dealers, investment advisors and investing.

## What investment services and advice can you provide me with?

Maxele Advisors offers Investment Management Services customized to each client based on your individual circumstances, risk tolerance, and financial goals. We also provide Comprehensive Financial Planning and Wealth Planning for individuals and their families, including high net worth clients which include but not limited to retirement planning, cash flow and debt planning, tax planning strategies, asset protection, college funding, estate strategies, and long-term care strategies.

We monitor your investments and provide recommendations, typically under discretionary authority you grant us. This allows us to buy and sell investments in your account without prior approval for each trade. In limited cases, we provide non-discretionary investment management, which requires your approval before trades are placed. We currently do not require a minimum asset level to engage our services, although we may set a minimum account size at our discretion. We may also provide planning services for a fee without direct investment management, either as a separate service or as an incidental part of our investment management services. As part of our investment management services, we review your account and consult with you periodically, at least annually. Additional information about our services is available in Item 4 of our ADV Disclosure Brochure on our website www.maxeleadvisors.com

Please Ask Us the Following Questions: Given **my financial situation, should I hire a financial planner, wealth manager, or investment advisor services? Why or why not? What is the difference between each of these services? How will you select the services and investments you recommend to me? What is your professional experience in the investment advisory and financial planning industry including years within the industry, education, and other qualifications? What do they mean?**

### Ask Us: What fees will I pay?

Our fees vary based on the services we provide. Investment management fees are annualized, based on the assets we manage for you, and billed quarterly in advance or in arrears. The fee you pay may be higher or lower depending on your assets under management, and fee rates decline as asset levels increase. Fees are negotiable, and not all clients pay the same rate. We may charge separate fees for planning services, which will be disclosed in writing before any services are provided or fees are incurred. You may also pay other fees that Maxele Advisors does not receive, such as brokerage fees, exchange-traded fund (ETF) or mutual fund fees, custodian fees, and trading charges. Additional information about our fees is available in Items 5 and 6 of our ADV Disclosure Brochure on our website www.maxeleadvisors.com

**ASK US: Please explain how these fees and costs will affect my investment. If I invest $10,000 with you, what amount will it go toward fees and costs, and how much will be invested?**

## What are your legal Obligations to me when acting as my Investment Adviser including Financial Planning/Wealth Planning? How does the firm make money and what conflicts of interest do you have?

When we function as your investment adviser or provide planning services, we must act in your best interest and not put our interests ahead of you. We are a fee - only Investment advisor and can only be paid by our clients and not by a bank, brokerage firm, or insurance company. Maxele has no relationship with other outside financial entities. We do not accept commissions from brokerage firms or insurance companies and do not sell any products such as insurance or annuities. **Our receiving advisory fee for managing clients results in a conflict of interest. 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.** Here is an example to help you understand what this means: If your portfolio grows or if you transfer additional assets into your account, the total dollar amount of the fees that you pay will increase, so we have an incentive to encourage you to move additional assets into your account. To help reduce this conflict**, Maxele** may lower fees as your assets increase. Maxele may also aggregate family accounts which may lower advisory fees.

**ASK US: How do your financial professionals make money?** Our employees are paid salaries and may also be paid a bonus based on performance, the number of clients assigned to them and the amount of total asset under management. Employees only work for Maxele Advisors and have no outside relationships with other financial companies.

**ASK US: Do you or your financial professionals have legal or disciplinary history? No, Maxele does not have any financial professionals with legal or disciplinary history. (**You can visit Investor.gov/CRS and use their free and simple search tool to research Maxele Advisors history).

## ASK US: Who is my primary contact person? Is she or he 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?

For more information about our services, please visit our website, maxleadvisors.com, where you can find our ADV Disclosure Brochure. You may also request a copy of this relationship summary by calling us at 314 961-1850.