

**Form ADV Part 3 (Form CRS)  
Client Relationship Summary  
Alliance Wealth Management, LLC  
October 1, 2025**

**Item 1 - Introduction: Is an investment advisory account right for you?**

Alliance Wealth Management, LLC is registered with the Securities and Exchange Commission and the Texas State Securities Board as a Registered Investment Adviser (RIA). Brokerage and investment advisory services and fees differ. It is important for you to understand how these differences affect you. Free and simple tools are available to research firms and financial professionals at [Investor.gov/CRS](https://Investor.gov/CRS), which also provides educational materials about broker- dealers, investment advisers, and investing.

**Item 2 - What investment services and advice can you provide me?**

We offer private wealth management to individuals, families, and trusts. Our services include global investment management, wealth planning, trust and estate coordination, and financial advisory. We collaborate with attorneys, accountants, and trustees to deliver integrated financial strategies.

- **Monitoring:** Portfolios are monitored continuously and reviewed at least annually.
- **Investment Authority:** Advisory services are managed on a discretionary basis, allowing us to manage portfolios without advance client approval within agreed-upon parameters.
- **Limited Offerings:** We do not offer proprietary products or receive compensation from third-party providers.
- **Account Minimum:** A typical minimum relationship size is \$250,000; however, the Investment Committee has discretion to set the minimum account size.

Additional details are available in our **Form ADV, Part 2A (Items 4, 7 & 8)**.

**Key Questions to 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 - What fees will I pay?**

Alliance Wealth Management charges a fee based on assets under management, billed quarterly in advance. Fees are negotiable and stated in your advisory agreement.

Additional costs include custodian charges, fund expenses, and transaction fees, which are separate from our advisory fee. These costs reduce your investment returns whether your investments gain or lose value.

Our full fee schedule is in Form ADV Part 2A, Item 5 and our Client Advisory Contract, both filed with the Texas State Securities Board.

**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.**

### Key Questions to 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?**

**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 is an example to help you understand what this means.

- Investment advisers face conflicts of interest which are inherent in the business. Our primary source of compensation is through asset-based fees. Therefore, we are incentivized to acquire new clients and to increase assets under management which could cause us to take overly aggressive positions in conflict with your interests to grow your account.

Refer to our Form ADV Part 2A Brochure to help you understand what conflicts exist.

### Key Questions to ask your Financial Professional

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

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

The financial professionals servicing your account(s) are compensated by charging a fee based on assets under management.

#### Item 4 - Do you or your financial professionals have legal or disciplinary history?

No, our firm and our financial professionals currently do not have any legal or disciplinary history to disclose. Visit [Investor.gov/CRS](https://investor.gov/CRS) for a free and simple research tool.

### Key Questions to ask your Financial Professional

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

#### Item 5 - Additional Information

You can find additional information about your investment advisory services and request a copy of the relationship summary at 888-852-5412 or click the link provided <https://www.alliance-wealth.us> .

### Key Questions to 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?**