

WealthEdge Investment Advisors, LLC

Form CRS: Customer Relationship Summary, February 14th, 2025

Introduction	<p>WealthEdge Investment Advisors, LLC is registered with the Securities and Exchange Commission (SEC) as an investment adviser. Our investment advisory services and fees differ from other investment advisers and it is important for you to understand these differences in order to determine which type of account or service is right for you.</p> <p>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.</p>
What investment services and advice can you provide me?	<p>We offer investment advisory services to retail investors, including portfolio management services and asset management services. We provide advisory services to individuals (other than high net worth individuals), high net worth individuals, pension and profit sharing plans (other than plan participants), 401(k) plans, corporations or other businesses not listed. Our investment recommendations are not limited to any specific product or service and we generally include advice regarding the following securities: Exchange-listed securities, Corporate debt securities (other than commercial paper), Certificates of deposit, Municipal securities, Mutual fund shares, and United States governmental securities. A minimum of \$50,000 of assets under management is required for this service. The account size may be negotiable under certain circumstances. WealthEdge makes recommendations and monitors accounts on a quarterly basis. We provide discretionary asset management services, in which we place trades in a client's account without contacting the client before each trade to obtain the client's permission.</p> <p><i>For additional information, please see ADV, Part 2A brochure (Items 4 and 7).</i></p> <p>Conversation Starters. Ask your financial professional:</p> <ul style="list-style-type: none">• 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?
What fees will I pay?	<p>Our annual fees for Individual Portfolio Management Services and Model Portfolio Management Service are based upon a percentage of assets under management and generally range from 0.2% for fixed income portfolios up to 2.5% for individual and model portfolio management services. Our fees are billed in arrears at the end of each calendar quarter based upon the average daily balance in the client's account during the previous quarter.</p> <p>There may be other fees and costs related to investment advisory services and investments, including custodian fees, account maintenance fees, fees related to mutual funds and variable annuities, other transactional and product level fees, and subadvisory fees.</p> <p>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.</p> <p><i>For additional information, please see Form ADV, Part 2A brochure (Items 4 and 7).</i></p> <p>Conversation Starter. Ask your financial professional:</p> <ul style="list-style-type: none">• 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?

<p>What are your legal obligations to me when acting as my investment adviser?</p> <p>How else does your firm make money and what conflicts of interest do you have?</p>	<p>When we act as your investment adviser, we have to act in your best interest and not put our interests ahead of yours. You should understand, the way we make money does not create conflicts with your interests. Here are some examples to help you understand what this means. We do not:</p> <ul style="list-style-type: none"> • Recommend proprietary products • Receive third-party payments • Participant in revenue sharing • Participant in principal trading <p>Conversation Starter. Ask your financial professional:</p> <ul style="list-style-type: none"> • How might your conflicts of interest affect me, and how will you address them? <p><i>For additional information, please see Form ADV, Part 2A brochure.</i></p>
<p>How do your financial professionals make money?</p>	<p>WealthEdge’s financial professionals earn cash compensation. Financial professionals are compensated based on factors such as the amount of client assets they service, the time and complexity required to meet a client’s needs, and revenue the firm earns from the financial professional’s recommendations.</p>
<p>Do your financial professionals have legal or disciplinary history?</p>	<p>WealthEdge is required to disclose any legal or disciplinary events that are material to a client's or prospective client's evaluation of our advisory business or the integrity of our management. Our firm and our management personnel have no reportable disciplinary events to disclose.</p> <p>Visit Investor.gov/CRS for a free and simple search tool to research us and our financial professionals.</p> <p>Conversation Starter. Ask your financial professional:</p> <ul style="list-style-type: none"> • As a financial professional, do you have any disciplinary history? For what type of conduct?
<p>Additional Information</p>	<p>You can find additional information about our advisory services in our Form ADV, Part 2A Brochure, located at https://adviserinfo.sec.gov/firm/summary/126337 and may request an up-to-date information and a copy of our Relationship Summary by contacting us at (646) 518-3455.</p> <p>Conversation Starter. Ask your financial professional:</p> <ul style="list-style-type: none"> • 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 I am being treated?