

## **RELATIONSHIP SUMMARY**

WCM Global Wealth, LLC (“WCM”, “we” or “us”) 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 the differences. Free and simple tools are available to research firms and financial professionals at [Investor.gov/CRS](https://www.investor.gov/crs), which also provides educational materials about broker-dealers, investment advisers, and investing.

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

We offer investment advisory services to retail investors. Our advisory services focus on investment planning and selection including consultations on retirement, income, estate, insurance and charitable planning. Prior to opening an account with us, we will meet with you to gain an understanding of your current investments, assets, income, goals and risk tolerance, and will then recommend specific portfolio investments. Investments are actively monitored on at least a quarterly basis as a standard service.

Our accounts are managed on a discretionary basis which means you sign an agreement giving us the authority to buy and sell securities on your behalf. This agreement remains in place until either party terminates the relationship. We do not have a minimum account size.

We also provide access to private funds through internally managed entities. These investments are generally available to investors who have income or assets above specified levels. Some private funds have a minimum investment amount. Each private fund is governed by its own documents, which are made available for review prior to investment and include information on the structure, fees, expenses, assets, and objectives of the investment.

**Additional information about our services can be found in Items 4 and 7 of our Form ADV, Part 2A brochure, which can be accessed at <https://adviserinfo.sec.gov/firm/summary/156594> and our website at [www.wcmglobalwealth.com](http://www.wcmglobalwealth.com).**

### **Ask your financial professional:**

1. *Given my financial situation, should I choose an investment advisory service? Why or why not?*
2. *How will you choose investments to recommend to me?*
3. *What is your relevant experience, including your licenses, education, and other qualifications? What do these qualifications mean?*

### **What fees will I pay?**

You will be charged an ongoing fee calculated as a percentage of the assets we manage for you. The fee is 1%-2% annually based upon the value of the assets in your account. Fees are collected quarterly and automatically deducted from your account. We typically have the incentive to increase the value of your account which will in turn increase our fees over time. There may be additional expenses if we choose to use mutual funds or ETFs in your account, and you should ask your adviser about these costs.

Private fund investors normally pay an annual management fee calculated as (i) a percentage of capital account balances or capital contributions plus leverage (if any), (ii) a fixed fee, or (iii) a combination of the foregoing. This fee may be 2% annually or another disclosed rate and is typically charged quarterly or monthly. Additional costs to investors may include their pro-rata share of shared overhead, legal, and tax expenses of the fund. With respect to private fund investors, we may also receive compensation based upon the performance of the investments. This may be 20% of the cash flow or profits, or another disclosed amount. These fees will impact the overall performance of your investments.

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.

**Additional information about our fees and costs can be found in Items 5 and 6 of our Form ADV, Part 2A brochure, which can be accessed at <https://adviserinfo.sec.gov/firm/summary/156594>**

**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 are some examples to help you understand what this means.

- We earn greater fee revenue as clients increase the amount of assets we manage.
- Our fee revenue may vary depending on the type of investment. For example, the fees earned from a private fund investment may be greater than the fees earned from a more traditional investment account.
- We, our affiliates, and our principals may have material ownership in a private fund or the assets of a private fund. This ownership stake may consist of capital contributed, services contributed, or both, and we may be incentivized to devote time to investments in which we have such ownership interests.

**Ask your financial professional:**

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

**Additional information about our conflicts of interest can be found in our Form ADV, Part 2A brochure, which can be accessed at <https://adviserinfo.sec.gov/firm/summary/156594>.**

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

Our financial professionals are employees of our firm and are paid on a salaried basis. In addition, employees are eligible for annual discretionary bonuses which are influenced by the amount of assets we manage in the applicable year. In certain circumstances, our professionals may serve as licensed insurance professionals and receive commissions from insurance companies for products sold.

**Do you or your financial professionals have legal or disciplinary history?**

Yes. You may visit <https://Investor.gov/CRS> for a free and simple search tool to research us and our financial professionals.

**Ask your financial professional:**

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

**Where can I find additional information?**

**You can find additional information about our investment advisory services in our Form ADV, which is available at <https://adviserinfo.sec.gov/firm/summary/156594>. You may request a copy of the Relationship Summary and other information by contacting any of our financial professionals or support staff at (864) 967-9838.**

**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?*