Precedent
WEALTH PARTNERS

FORM CRS (Client Relationship Summary)
Precedent Wealth Partners, LLC
March 19, 2026

Introduction

Precedent Wealth Partners, LLC, an investment adviser registered with the Securities and Exchange Commission and, as such, we provide advisory services rather than brokerage services. Brokerage and investment advisory services and fees differ, and it is important for you, our client, to understand the differences. Additionally, 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.

What investment services and advice can you provide me?

We offer the following investment advisory services to retail investors: Portfolio Management Services; Financial Wealth Planning & Consulting Services and Retirement Consulting Services. For more detailed information regarding our services, fees and other disclosures for our firm, please refer to Items 4, 5, 7, 8, 13, and 16 in our Form ADV Part 2A Brochure in this link: https://adviserinfo.sec.gov/firm/brochure/325203.

- Account Monitoring: If you choose to open an advisory account with us, as part of our standard services, we will meet with you initially to assess your current financial situation. Depending on your financial situation, we will recommend a portfolio of investments that are tailored to your financial needs. Our firm will monitor your investments on at least an annual basis.
- Investment Authority: We offer investment accounts on both a discretionary basis and non-discretionary basis. In a discretionary account, we have discretion to select, retain, or replace securities and/or third-party managers to manage your account(s). You do have the option to limit discretionary authority by providing us with your restrictions and guidelines in writing. In a non-discretionary account, we will provide advice, but ultimately you decide which investments to buy and sell for your account(s).
- Investment Offerings: We provide advice on various types of investments, and we do not restrict our advice to limited types of products or investments.
- Account Minimums and Requirements: Generally, we do not have minimum amounts or requirements for opening and maintaining accounts with us.

Conversation Starter:
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?

You will be charged an ongoing quarterly fee based on the value of the assets in your account. Our maximum Portfolio Management Services annual fee is 1%. The more assets you have in your advisory account, the more you will pay us. We therefore have an incentive to increase the assets in your advisory account in order to increase our fees. The amount you pay will depend, for example, on the services you receive and the amount of assets in your account. Our firm's fees will be automatically deducted from your advisory account, which will reduce the value of your advisory account. In rare cases, we will agree to send you invoices rather than automatically deduct our fees from your advisory account.

Financial Wealth Planning / Consulting fees are on rare occasions charged in addition to the quarterly fees (at fixed or hourly rates) only with prior separate agreement by you and the firm. You can find more information about our fees and costs under Item 5 of our Disclosure Brochure or Item 4 of Appendix 1 to our Disclosure Brochure, available at Investor.gov/CRS.

In addition to advisory and transaction fees, there are additional fees such as postage and handling, transfer taxes, SEC fees for sales of securities, and similar fees. These additional fees are not material, but like advisory fees and custodian fees, they do have an adverse impact on the value of your portfolio over time.

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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 is in Item 5 of our Firm Brochure, which is available online at https://adviserinfo.sec.gov/firm/brochure/325203.

Conversation Starters:
Help me understand how these fees and costs may 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 interests 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:

We maintain a business relationship with Dynasty Financial Partners, LLC ("Dynasty"). Dynasty offers operational and back-office core service support including access to a network of service providers. While we believe this relationship best serves your interest, this relationship may potentially present certain conflicts of interest due to the fact that Dynasty is paid by us or our Clients for the services referenced above.

Additional information about our conflicts of interest is in our Form ADV Part 2A Brochure which can be accessed online at https://adviserinfo.sec.gov/firm/brochure/325203.

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

How do your financial professionals make money?

Our financial professionals are compensated by our firm from revenue paid to the firm for advisory services and consulting services rendered to our clients. Advisors' compensation is typically based upon the amount of client assets they service, and the time and complexity required to meet a client's needs.

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

No, our firm and financial professionals do not have any legal and disciplinary history to disclose. Visit Investor.gov/CRS for a free and simple search tool to research our firm and financial professionals.

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

You can find additional information about our firm's investment advisory services on the SEC's website at www.adviserinfo.sec.gov by searching CRD # 325203. You may also contact our firm at (713) 244-6450 to request a copy of this relationship summary and other up-to-date information.

Conversation Starter:
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?