**Evans Wealth Management**

**Form CRS-Customer Relationship Summary January 2021**

**Introduction**

**Evans Wealth Management is registered with the Securities and Exchange Commission (SEC) as an investment adviser.**

**Brokerage and investment advisory services and fees differ, and that it is important for you to understand these differences. Free and simple tools are available to research firms and financial professionals at www.Investor.gov/CRS, which also provides educational materials about broker-dealers, investment advisers, and investing.**

**Relationships and Services**

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

**We offer to retail investors investment advisory services. Our advisory services include Asset Management and Financial Planning and Consulting. If you open an advisory account with our firm, we will meet with you to understand your current financial situation, existing resources, goals, and risk tolerance. Based on what we learn, we will recommend a portfolio of investments (stocks, ETF’s, bonds, money market instruments) that is monitored at least quarterly, and if necessary, rebalanced annually to meet your changing needs, stated goals, and objectives.**

**All the clients of Evans Wealth Management authorize the advisor to use discretionary authority, meaning the advisor is allowed to buy and sell investments in your account without asking you in advance. Any limitations will be described in the signed advisory agreement. We will have discretionary authority until the advisory agreement is terminated by you or our firm.**

**We do not restrict our advice to limited types of products or investments.**

**Our firm does not impose requirements for opening and maintaining accounts or otherwise engaging us.**

**Financial Planning and Consulting is also offered as a separate service for an additional flat fee. We do not monitor your investments for the Financial Planning and Consulting Service.**

**We do not have any Account Minimums and Other Requirements to have an account.**

**For additional information about our advisory services is located on Page 5 of our Firm Brochure, which is available online at** [**https://advisorinfo.sec.gov/firm/summary/164320**](https://advisorinfo.sec.gov/firm/summary/164320)**.**

***Ask your financial professional:***

* **Given my financial situation, should I choose a brokerage service or investment advisory service? Why or why not?**
* **Given my financial situation, should I choose an investment advisory service? Should I choose a brokerage service? Should I choose both types of services? 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?**
* **Help me understand how your fees may affect my investments. If I gave you $10,000 to invest, how much will go to investments and how much go to fees?**
* **As a financial professional, do you have any disciplinary history? For what type of conduct?**
* **Who is my primary contact person?**
* **If I am being treated unprofessionally who can I talk to at your firm regarding my concerns?**

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

**You will be charged an ongoing quarterly fee based on the value of the investments in your account. Our Asset Management maximum annual fee is 1.65%. 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. Our firm’s fees will be automatically deducted from your advisory account, which will reduce the value of your advisory account.**

**The minimum quarterly fee is $50 and we do not have a maximum fee. We charge a flat $300 for Financial Planning services.**

**The Exchange Traded Funds (ETF’s) we buy in many accounts often will have an internal management fee of .10% or .20% to manage the ETF. You pay this in addition to our Advisory Fee.**

**Additional information about our fees is located on Page 6 of our Firm Brochure, which is available online at** [**https://advisorinfo.sec.gov/firm/summary/164320**](https://advisorinfo.sec.gov/firm/summary/164320)**.**

***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. We make no money from other professionals or products.**

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

**Our advisors make money from the advisory fees paid by our clients plus Financial Planning fees paid by our clients.**

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

**Yes, our firm and advisors have legal history. Visit www.Investor.gov/CRS for a free and simple search tool to research our firm and your financial advisor. *​***

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

**No disciplinary history. Visit www.Investor.gov/CRS for a free and simple search tool to research our firm and your financial advisor. *​***

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