

# RANGE ADVISORY, LLC CLIENT RELATIONSHIP SUMMARY

## September, 2026

### Is an Investment Advisory Account Right for You?

There are different ways you can get help with your investments. You should carefully consider which types of accounts and services are right for you. We are an investment adviser and provide advisory accounts and services rather than brokerage accounts and services. This document gives you a summary of the types of services we provide and how you pay. Please ask us for more information. There are some suggested questions herein. Range Advisory, LLC ("Range Advisory" or "Range") is an investment adviser registered with the U.S. Securities and Exchange Commission ("SEC"). The services of and fees for brokerage and investment advisory services differ, and it is important for you to understand those differences. Free and simple tools are available to you to research our firm, other firms and Financial Professionals at <https://www.investor.gov/CRS>, where you may also find important educational materials about broker-dealers, investment advisers and investing.

### Relationships and Services

Range Advisory provides discretionary investment management through two arrangements. First, Range Advisory constructs and maintains model portfolios used in client accounts, selecting the underlying securities and their weightings and changing them from time to time. Range currently utilizes Apex Clearing Corporation and Altruist Financial LLC for its custom built model portfolios. Second, Range Advisory may select among asset management strategies or models made available through one or more Turnkey Asset Management Platforms ("TAMPs") and the third-party investment advisers that manage those strategies or models.

Range Advisory also provides investment advice and financial planning with respect to assets and financial matters that are not subject to Range Advisory's discretionary investment management authority. These services may include advice regarding a client's asset allocation, portfolio construction, existing investments, retirement accounts, 529 plan accounts, brokerage accounts, private investments and other financial assets. Range Advisory may make recommendations regarding particular securities, investment strategies or other courses of action. The client decides whether to accept or reject these recommendations and is responsible for implementing any recommendation the client elects to follow. Range Advisory does not have authority to place trades or otherwise effect transactions in these accounts on the client's behalf.

Please see our firm brochure, Form ADV 2A, for additional information regarding our services. Other firms could provide advice on a wider range of choices, some of which might have lower costs.

Click here for a copy or go to [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

Conversation Starters. 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?

Our Obligations to You We must abide by certain laws and regulations in our interactions with you. When we act as your investment adviser, we are held to a fiduciary standard that covers our entire investment advisory relationship with you. For example, we are required to monitor your portfolio, investment strategy and investments on an ongoing basis. Our interests can conflict with your interests. We must eliminate these conflicts or tell you about them in a way you can understand, so that you can decide whether or not to agree to them.

Conversation Starters. Ask your Financial Professional:

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

While the receipt of commissions creates an existing conflict (because the Financial Professional is incentivized to make the recommendation), you are free to reject an/or implement such recommendations with any Financial

Professional of your choosing. Please refer to our firm brochure Form ADV 2A for important additional information regarding annuity and insurance products. More detailed information about our conflicts of interest can be found in Items 4, 5, 8, 10, 11, 12 and 14 of our Form ADV Part 2A disclosure brochure. For a copy, go to [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) or ask your Financial Professional to provide you with a copy.

### Fees and Costs

Clients (or “Members”) pay a flat subscription fee to Range Finance, Inc., Range Advisory, LLC’s affiliated parent company, for access to the Range platform and the services included in the Member’s selected service tier. Range Finance currently offers three service tiers: Premium, Platinum and Titanium. The current annual subscription fees are \$3,950 for Premium, \$5,950 for Platinum and \$12,500 for Titanium. Range Finance’s fee schedule is disclosed on its website at [www.range.com/pricing](http://www.range.com/pricing) and fees are set forth in each Member’s advisory agreement. Subscription fees may be billed annually, semi-annually, quarterly, monthly, or at another interval offered by Range Finance.

Range Advisory provides financial planning and other advisory services and, for clients who enter into a discretionary advisory agreement with Range Advisory, discretionary investment management. Range Advisory does not charge a separate AUM-based advisory fee for its discretionary investment management services. Accordingly, a client receiving discretionary investment management generally pays the applicable subscription fee described above rather than an additional fee based on assets under management.

The subscription fee does not include all fees and expenses that a client may incur in connection with an investment account. Clients may incur brokerage, custodial, transaction, transfer, wire, account closing and other account level fees imposed by custodians, broker dealers or other third parties. Mutual funds, exchange traded funds and other pooled investment vehicles also charge their own internal fees and expenses, as disclosed in their applicable offering documents. Certain investment strategies may also carry a platform, model or third-party asset management fee charged directly by a qualified custodian, model provider or turnkey asset management program.

More detailed information about our fees and other costs associated with investing, along with applicable conflicts, can be found in Items 5, 10 and 14 of our Form ADV Part 2A disclosure brochure. For a copy, go to [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) or ask your Financial Professional to provide you with a copy.

Conversation Starters. 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?

Conflicts of Interest We benefit from the advisory services we provide to you.

Under our Customized Financial Advisory Services the firm charges a tier-based subscription fee for its services. This method of compensation may create conflict with your interests. The more revenue generated from fees, the more revenue the firm will make which creates an incentive to encourage you to pursue a higher tier subscription service.

Our financial advisors have personal accounts held and managed outside of our firm. Our financial professionals may have an incentive to favor their personal accounts over yours, which creates a conflict of interest.

As a Financial Professional, do you have any disciplinary history?

No, our firm and/or financial professionals do not have any legal and disciplinary history. Visit [www.investor.gov](http://www.investor.gov) for a free and simple search tool to research us and our financial professionals.

Additional Information

For additional information on our advisory services, see our Form ADV Brochure on [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) or on our website ([www.range.com](http://www.range.com)). To report a problem to the SEC, visit [www.investor.gov](http://www.investor.gov) or the SEC’s investor assistance line (800) 732-0330. If you have a problem with your investment, account or financial professional, contact us in writing at [support@range.com](mailto:support@range.com) or by phone at (703) 261-4126.

Conversation Starters. Ask your Financial Professional:

- Who is my primary contact person? Are they a representative of an investment adviser or broker dealer?
- Who can I talk to if I have concerns about how the person is treating me?