

Introduction

Fuse Partners Group LLC operates as an Investment Advisor registered with the Securities and Exchange Commission, maintaining offices across the United States. It's important to note that registration as an Investment Advisor doesn't indicate any level of skill or training. Brokerage and investment advisory services come with variations in fees and it's crucial, especially for retail investors, to understand these distinctions. <https://www.investor.gov/CRS> offers accessible tools to research firms and financial professionals. Additionally, it provides educational materials on broker-dealers, investment advisers, and investing.

Relationship and Services

What investment services and advice can you provide me?

- Fuse Partners Group caters to high net worth, business owners and retail investors, offering services such as Investment Advisory, Wealth Planning, Financial and Tax Planning, Retirement Plan Consulting, Benefits Consulting and Executive Financial Counseling. These services are customized based on individual client needs, considering specific goals, risk tolerance, time horizon, investment restrictions, and other influencing factors. We utilize investment risk profiles to guide investment management and continuously monitor accounts to align with client objectives.

How will you choose investments to recommend to me?

- Fuse Partners Group usually exercises discretion in selecting third-party investment managers and determining the securities' identity and amounts during an advisory relationship. This discretion aligns with the client's stated investment risk profile. We also offer non-discretionary services, seeking prior client authorization before implementing recommendations.

To commence and maintain an investment advisory relationship, Fuse Partners Group typically requires a minimum portfolio size of \$500,000 however, the minimum may be waived at our discretion.

For a comprehensive description of our services and account conditions, please refer to Fuse Partners Group' ADV Part 2A Disclosure Brochure, Item 4, and Item 5, accessible at <https://adviserinfo.sec.gov/firm/summary/168733>

Fees, Cost, Conflicts, and Standard of Conduct

What fees will I pay and how do your financial professionals make money?

- Fuse Partners Group charges asset-based, fixed, and hourly fees. The fee for wealth management services, including investment advisory, ranges up to 2.50% annually of assets under management and is negotiable based on specific criteria. While our standard agreement encompasses all services, we may occasionally quote a fixed annual retainer based on the engagement scope. We might also enter into performance fee arrangements with qualified clients. It's important to note that fees and costs will impact investment returns over time. Understanding additional fees, such as custodian fees and underlying investment fees, is crucial. More details on our fees and calculations



can be found in Item 5 of Fuse Partners Group' ADV Part 2A Disclosure Brochure at <https://adviserinfo.sec.gov/firm/summary/168733>. Our advisors' compensation is not tied to the assets they manage personally.

For further information on Purshe Kaplan Sterling ("PKS"), Registration, Brokerage Practices, Sponsorships, and Conflicts of Interest, please refer to Fuse Partners Group' ADV Part 2A Disclosure Brochure, Item 10 and Item 12 at <https://adviserinfo.sec.gov/firm/summary/168733>.

Disciplinary History

Does Fuse Partners Group LLC or a Fuse Partners Group financial professional have legal or disciplinary history?

- Yes, please refer to Fuse Partners Group' ADV Part 2A Disclosure Brochure, Item 9, at <https://adviserinfo.sec.gov/firm/summary/168733>. If you would like further information please contact Fuse Partners Group at (972) 361-1001 for more information.
- Yes, certain financial professionals at Fuse Partners Group have disclosable events. To view these events, you can utilize the free tools available at <https://www.investor.gov/CRS> to research our firm and financial professionals. This resource also provides educational materials about investment advisers and investing. Additionally, review your financial professional's ADV Part 2B for essential details and disclosures.

Additional Information

Please visit <https://fuse-partners.com/> home or call (972) 361-1001 for more information about our services or to obtain a copy of this Form CRS.

