

# RANGE ADVISORY, LLC CLIENT RELATIONSHIP SUMMARY

## March, 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 two (2) services:

**Non-Discretionary Services:** Under such customized engagements, Range Financial Planners (“Planner” or “Planners”) offer general advice on clients’ investment objectives based on specific questions or general discussions with the client. This relationship is set out in a non-discretionary advisory agreement between Range Advisory and the client. The Planner obtains the necessary financial data from the client, assists the client in determining the suitability of the advisory services and assists the client in setting the appropriate investment objective. The Planner provides periodic investment advice that is tailored to the individual needs of the client based on the investment objective discussed with the client.

This advice may include portfolio construction and optimization advice, as well as advice regarding particular equities (both public and private), bonds, ETFs, mutual funds, and other investments and may include investments held in a client’s brokerage accounts, 529 plan accounts, retirement accounts, such as 401(k) and IRA accounts, and other financial accounts.

**Discretionary Services:** Discretionary services are limited to investment accounts managed by Range Advisory, through its Planners, using one or more Turn-key Asset Management Platforms (TAMPs). Through TAMPs with which Range Advisory has entered into an agreement, Range Advisory, through its Planners, provides clients with discretionary investment advisory services through the use of asset management strategies or models offered by third party investment advisors (each third-party investment adviser referred to herein as a “TAMP adviser”). TAMP advisers are subject to review by Range Advisory and are subject to future change from time to time.

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. *For further information about our services and advice, please read **Items 4, 7 and 8 of our Form ADV Part 2A brochure.** 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. Here are some examples to help you understand what this means.*

#### **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**

Range Finance, Inc., our affiliated parent company, offers a flat subscription fee per client for access to the Range Advisory software platform. Through this platform customized financial advisory services are provided by Range Advisory. The fees are paid directly by clients who sign up for the platform online. Fees for Premium, Platinum, and Titanium tiers are paid upfront for the year. The fee for Range's latest offering Range Pro ("Pro") is billed monthly or annually. A portion of subscription fees charged for Premium, Platinum, or Titanium tiers are then passed from Range Finance to Range Advisory, LLC for the advisory service portion of the financial platform offering.

Under our Third-Party Asset Management Program (TAMP) Services, the firm does not charge any additional fee beyond the annual membership fee. Range also offers a one-time or planning service fee that is based on a per service of planning service basis. We retain the right to modify fees in its sole and absolute discretion, on a client-by-client basis. For recurring quarterly or semi-annual billed fees, the client will be responsible for those fees up to and including the effective date of termination. For billed up front fees payable to Range Advisory will not be pro-rated to the date of termination. One-time and planning service fees, shall be due immediately for the portion of the service or project completed as of the date of termination. *Other Fees and Costs.* In addition to the Range Program fees, Clients will incur other fees imposed by the TAMP sponsor. Refer to the TAMP sponsor's agreement for full disclosure of such fees. In addition, please refer to Item 5 Fees and Compensation of our Disclosure Brochure for additional details.

**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.**

*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)) and any brochure supplement your financial professional provides. To report a problem to the SEC, visit investor.gov or call the SEC's toll-free investor assistance line at (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? Is he or she 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?*