

Crestwyn Consulting Group LLC

Client Relationship Summary (Form CRS)

August 1, 2025

Item 1: Introduction

Crestwyn Consulting Group LLC is an investment adviser registered with the state of Texas. Advisory services and fees differ from those of a broker-dealer, and it's important to understand these differences.

Free and simple tools are available to research firms and financial professionals at [Investor.gov/CRS](https://www.investor.gov/crs), which also provides educational materials about investment advisers, broker-dealers, and investing.

Item 2: Relationships and Services

What investment services and advice can you provide me?

Crestwyn Consulting Group LLC offers investment advisory services tailored to a diverse range of clients, including high net worth individuals (HNWI), family offices, registered investment advisers (RIAs), other financial advisors, and institutional investors. Our services include:

- **Investment Management:** Ongoing discretionary portfolio management for both traditional and digital assets, customized to each client's objectives and risk tolerance.
- **Hourly Financial Consulting:** One-time or recurring advice on financial planning, asset allocation, and integration of digital assets such as cryptocurrencies.
- **Digital Asset Advisory:** Specialized guidance on investing in cryptocurrencies and digital assets, including access to qualified custodians such as Coinbase Prime and Alto IRA.
- **Institutional and Family Office Advisory:** Tailored advisory services designed to support the complex needs of family offices, institutions, and RIAs, including treasury management, governance support, and multi-asset portfolio oversight.

We regularly monitor portfolios for clients under investment management agreements. We manage accounts on either a **discretionary basis** (making investment decisions without requiring prior client approval) or a **non-discretionary basis** if agreed upon.

We do not offer proprietary products nor limit our advice to any particular type of investment. Our services may also include facilitating access to various investment options, providing market education, executing trades, and assisting with account setup through external custodians.

Ask us:

- “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 experience with crypto or alternative assets?”

Item 3: Fees, Costs, Conflicts, and Standard of Conduct

What fees will I pay?

You will pay fees based on the services you receive:

How You Work with Us	What You Get	Fee Structure
Work with Your Dedicated Advisor	Personalized portfolio management, financial planning, and strategic guidance. Ideal for individuals and families seeking long-term engagement.	Asset-based fee Typically up to 1.75% annually, depending on the level of assets and scope of services. Fees are billed quarterly.
Hourly Financial Consulting	Tailored, on-demand advice for planning, investment reviews, or crypto integration. Suitable for those not yet ready to commit assets.	Hourly rate Typically \$250–\$400/hour, billed as services are rendered. Project-based pricing may be available.
Enterprise Advisory Services	Advisory support for operating businesses and family offices. Includes strategy and crypto/treasury advisory.	Custom engagement fee Typically includes a retainer plus hourly or flat-rate structure, depending on the scope of services. AUM-based pricing may be available for asset oversight.

You will pay fees regardless of investment performance, and fees are charged even when no trades occur. Additional costs may include custodian or platform fees (e.g., Coinbase Prime, Alto IRA), which we do not receive or share in.

Charging a percentage of assets under management creates a potential conflict of interest, as we may have an incentive to encourage you to increase those assets.

Ask us:

- “Help me understand how these fees and costs might affect my investments.”
- “If I give you \$100,000 to manage, how much will go to fees and how much to investments?”

Item 4: Disciplinary History

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

No. Visit [Investor.gov/CRS](https://www.investor.gov/crs) for a free and simple search tool to research us and our financial professionals.

Ask us:

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

Item 5: Additional Information

You can learn more about our services or request a copy of this summary:

- Website: www.crestwyn.com
- Phone: (512) 631-5975
- Email: hello@crestwyncapital.com

Ask us:

- “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?”