

Crestwyn Consulting Group - Form ADV Part 2A

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Firm Brochure – August 2025

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This brochure provides information about the qualifications and business practices of Crestwyn Consulting Group. If you have any questions about the contents of this brochure, please contact us at hello@crestwyn.com or (512) 631-5975. The information in this brochure has not been approved or verified by the United States Securities and Exchange Commission or by any state securities authority.

Additional information about Crestwyn Consulting Group is available on the SEC's website at www.adviserinfo.sec.gov.

Material Changes

This section will be updated annually and whenever material changes occur. Material changes will be highlighted and communicated promptly.

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Advisory Business

Crestwyn Consulting Group is a registered investment adviser providing digital asset and traditional investment advisory services tailored for high-net-worth individuals, family offices, and institutional clients. Services include portfolio management, wealth planning, and consulting. Strategies are customized to each client.

No Wrap Fee Program

Crestwyn Consulting Group does not offer a wrap fee program. While our AUM-based fee may include financial planning and ongoing portfolio monitoring, clients are responsible for separate transaction, custodial, and third-party management fees incurred through custodians or platforms used in connection with their accounts.

Fees and Compensation

Hourly Consulting: \$350/hour; no minimum; billed at time of service.

Private Client Advisory: Up to 1.75% AUM annually; billed monthly in advance based on the value of the assets under management as of the last business day of the previous month, and adjusted for deposits or withdrawals. This is consistent with industry practices such as those used in Merrill Lynch advisory programs.

Other Fees and Costs

Our advisory fees do not include brokerage commissions, transaction fees, custodial fees, or fees charged by third-party investment platforms or products (such as crypto exchanges or automated portfolio solutions). These fees are charged separately by the respective providers and are borne by the client. Crestwyn does not receive any portion of these third-party fees.

Enterprise Package: Custom fee arrangements.

Fees may be negotiable and subject to agreement terms. Clients may terminate agreements in writing, with pro-rata refunds for prepaid fees.

Performance-Based Fees and Side-by-Side Management

Crestwyn does not charge performance-based fees.

Types of Clients

High-net-worth individuals, family offices, institutional investors, and RIAs.

Methods of Analysis, Investment Strategies, and Risk of Loss

We employ fundamental and quantitative analysis, portfolio diversification, and risk mitigation. Investing in digital assets carries significant risks including regulatory uncertainty, volatility, and cybersecurity threats. Investing involves risk of loss.

Disciplinary Information

Neither Crestwyn nor its personnel have any legal or disciplinary events to disclose.

Other Financial Industry Activities and Affiliations

We do not have any material affiliations.

Code of Ethics

We maintain a Code of Ethics addressing conflicts of interest and personal trading policies.

Brokerage Practices

We recommend custodians and broker-dealers based on best execution and cost considerations. No compensation is

received for referrals.

Review of Accounts

Client account reviews are conducted minimally on an annual basis. Reviews assess performance and alignment with client objectives.

Client Referrals and Other Compensation

We may pay referral fees in compliance with applicable laws.

Custody

We do not take custody of client assets. Third-party custodians are used.

Investment Discretion

Discretionary authority is granted only by client agreement.

Voting Client Securities

We do not vote client proxies but may offer guidance upon request.

Financial Information

We have no financial impairment that would affect our ability to meet contractual obligations.