

EQ, LLC dba EQ Wealth Management
Form CRS Customer Relationship Summary, March 28, 2024

Firm Introduction	EQ, LLC is registered with the Securities and Exchange Commission (SEC) as an investment adviser. Brokerage and investment advisory services and fees differ, and it is important for you to understand these differences. Free and simple tools are available to research firms and financial professionals at Investor.gov/CRS , which also provides educational materials about broker-dealers, investment adviser, and investing.
What investment services and advice can you provide me?	<p>We offer investment advisory services to retail and accredited investors. Services include: Investment Management, Financial Planning, and Consulting services. As part of our standard services we will offer you advice on a regular basis. We will discuss your investment goals, and design with you a strategy to achieve your investment goals, and regularly monitor your account. We endeavor to meet with clients at least annually to discuss your portfolio. We provide a variety of investment options ranging from mutual funds, ETFs, Bonds, Equities, other publicly traded securities and private funds. We generally require a minimum portfolio size of \$1 Million, which may be negotiable.</p> <p>You can choose an account that allows us to buy and sell investments in your account without asking you in advance (a "discretionary account") or we may give you advice and you decide what investments to buy and sell (a "non-discretionary account").</p> <p>For additional information, please see the EQ LLC ADV 2A brochure (Items 4 and 7 of Part 2A).</p> <p>Ask your financial professional:</p> <ul style="list-style-type: none">• 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?
What fees will I pay?	<p>Our standard Investment Management fees are charged on a tiered schedule: 1% below \$1 Million, 0.85% for assets between \$1 Million and below \$5 Million, and 0.575% for assets over \$5 Million. EQ Wealth Management has arranged for a back-office service provider to perform administrative, billing, reporting, and trading services to clients regarding their account. The annual fee for these services (up to 0.06% of the value of the account) will be deducted directly from the account on a quarterly basis in advance of the services being performed. Private Fund management fees are 1% for assets. Management fees are payable by investors quarterly, in advance, as of the beginning of each calendar month and are deducted directly from the investor's capital account. Our fees are generally not negotiable. Fees are billed once a quarter in advance.</p> <p>The asset-based fee reduces the value of your account and will be deducted from your account. The more assets you have in the advisory account, including cash, the more you will pay us. We therefore have an incentive to increase the assets in your account in order to increase our fees. You pay our fee quarterly even if you do not buy or sell.</p> <p>The amount you pay to our firm and your financial professional generally does not vary based on the type of investments we select on your behalf. We require written authorization from you in order to deduct advisory fees from your account held by your custodian. The custodian pays from your account when we submit written notice of the amount of the fee to be deducted. If there is insufficient cash in your account, securities may be sold. You may pay a transaction fee when we buy and sell an investment for you. In addition, some investments (such as mutual funds) impose additional fees that will reduce the value of your investment over time.</p> <p>You will pay fees and cost whether you make or lose money on your investments. Fees and cost will reduce any amount of money you make on your investments over time. Please make sure you understand what fees and cost you are paying.</p> <p>For additional information, please see Form ADV, Part 2A brochure (Items 4 and 7 of Part 2A) and other applicable documents.</p>

	<p>Ask your financial professional:</p> <p>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?</p>
<p>What are your legal obligations to me when acting as my investment adviser?</p> <p>How else does your firm make money and what conflicts of interest do you have?</p>	<p>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.</p> <p>When we act as your investment adviser, we have to act in your best interest and not put our interest ahead of yours. At the same time, the way we make money creates some conflicts with your interests. You should understand and ask us about these conflicts because they affect the recommendations we provide you. Here are some examples to help you understand what this means.</p> <p>The principal business of EQ, LLC is that of a registered investment adviser. Some of the principals and associated persons of the firm may be licensed as insurance agents. When acting in the capacity of an insurance agent, we make extra money by advising you to purchase insurance products which pay us a separate commission fee.</p> <p>The asset fee on our Private Fund is 1% and is not subject to breakpoints. We make more money if you move assets away from strategies that pay EQ, LLC a lower fee. We also have ownership in Axiom, a real estate project development company, and as a result we have an incentive to drive additional fund to Axiom projects.</p> <p>Ask your financial professional:</p> <p>How might your conflicts of interest affect me, and how will you address them? For additional information, please see Form ADV, Part 2A brochure and other applicable documents.</p>
<p>How do your financial professionals make money?</p>	<p>Our financial professionals receive a percentage of the asset-based fee we bill to your accounts as cash compensation. If your financial professional is an insurance agent, he/she may receive commission payments for insurance products sold to you. The more assets you have in the advisory account, including cash, the more you will pay us. We therefore have an incentive to increase the assets in your account in order to increase our fees.</p>
<p>Do your financial professionals have legal or disciplinary history?</p>	<p>No. We do not have any legal, financial or other “disciplinary” items to report to you. We are obligated to disclose any disciplinary event that would be material to you when evaluating our Firm and its associated persons.</p> <p>Visit Investor.gov/CRS for a free and simple search tool to research us and our financial professionals.</p> <p>Ask your financial professional:</p> <p>As a financial professional, do you have any disciplinary history? For what type of conduct?</p>
<p>Additional Information</p>	<p>For additional information about our services, please see Form ADV, Part 2A brochure and other applicable documents. If you would like additional, up-to-date information or a copy of this disclosure, please call 425-434-1000 or email us at Q@EQ-WM.COM</p> <p>Ask your financial professional:</p> <p>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?</p>