

Weber Global Management, Inc.  
CLIENT RELATIONSHIP SUMMARY  
March 31, 2023

This is the Client Relationship Summary for Weber Global Management, an SEC-Registered Investment Adviser. Brokerage and Investment Advisory services and fees differ, and it is important that you understand those differences.

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

**What investment services and advice can you provide me?**

The investment advisory service we provide is portfolio management and we do not provide brokerage services.

In our portfolio management service, we will continuously monitor your investments and provide advice; and we take discretionary authority in your accounts, which allows us to buy and sell investments in your account without asking you in advance. Clients can impose reasonable restrictions on the authority they give us.

We require clients maintain \$1,000,000 under our management, which can include the assets of multiple accounts or the entire household.

For more information, please review our disclosure brochures on the SEC website, which is available [here](#).

*Ask us: Given my financial situation, should I choose an investment advisor 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?**

We charge a percentage of assets under management for our portfolio management service assessed on a quarterly basis, in advance. You should be aware that the more assets there are in your account, the more you will pay in fees. This means we have an incentive to encourage you to increase the assets in your account. You will also incur other fees including brokerage fees and commissions, management fees for mutual funds and ETFs, custodian fees, retirement account annual fees, trade ticket charges, or banking fees in connection with an investment account and the securities in the account; Weber Global does not receive any of these fees.

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. For more information, please review our disclosure brochures on the SEC website, which is available [here](#).

*Ask us: 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?*

**What are your legal obligations to me when acting as my investment adviser? How else does your firm make money and what conflicts of interest do you have?**

*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 can affect the investment advice, we provide you. Here are some examples to help you understand what this means.*

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While Weber Global works to minimize conflicts with clients simply setting a fee for our services creates a conflict; as we have an incentive to charge you more rather than less for our services.

Ask us: *How might your conflicts of interest affect me, and how will you address them?*

For more information, please review our disclosure brochure, which is available [here](#).

**How do your financial professionals make money?**

Our firm's only compensation comes from our advisory fees. Representatives receive distributions from the firm based upon its profits. No one at the firm – other than as described here – is compensated based upon: the product sold (i.e., differential compensation); or product sales commissions.

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

No. Weber Global has not been subject to any reportable disciplinary events by regulators nor is it a party to any legal events that are material to client evaluation of our advisory business; however, you can visit [Investor.gov/CRS](http://Investor.gov/CRS) has a free and simple search tool that allows you to research your financial professionals.

Ask us: *As a financial professional, do you have any disciplinary history? For what type of conduct?* You can find more information about our investment advisory services [here](#).

***You can also contact Lance Hill at (385) 368-7690 or [clientservices@weberglobal.com](mailto:clientservices@weberglobal.com), if you have any questions or to request a copy of the relationship summary.***

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?*

Christopher Weber is your primary contact person. Mr. Weber is a registered investment advisor representative and is not employed or compensated by a broker-dealer.