

West Wealth Group, LLC
March 30, 2026
Form CRS

West Wealth Group, LLC is registered with the Securities and Exchange Commission as an investment adviser. We provide investment advisory services through financial professionals who are registered as investment adviser representatives of our firm and may operate under different business names. Brokerage and investment advisory services and fees differ and it is important for you, to understand these differences. Free and simple tools research firms and financial professionals at [Investor.gov/CRS](https://investor.gov/CRS), which also provides educational materials about broker-dealers, investment advisers, and investing. This document is a summary of the services and fees we offer to "retail" investors, which are natural persons who seek or receive services primarily for personal, family, or household purposes.

What investment services and advice can you provide me?

We offer the following investment advisory services to retail investors through West Wealth Group, LLC: Asset Management Services and Financial Planning & Consulting Services. Some of our advisors operate under affiliated or "doing business as" (DBA) trade names for marketing purposes; however, all advisory services are provided by West Wealth Group, LLC and supervised under our firm. We also provide educational seminars and webinars, which are free of charge.

In addition to investment management services, upon request we may provide access to a limited, no-cost estate planning tool that offers general educational information on basic estate planning topics, such as wills and trusts. These tools are limited in scope and do not constitute legal or tax advice. We may also provide limited

Account Monitoring: If you open an investment account with our firm, as part of our standard service we will monitor your investments on a regular basis as agreed to by us as a part of our ongoing advisory service. This shall be done no less frequently than annually. When third-party money managers ("TPMM") are used, we monitor their performance and investment approach to help ensure continued alignment with your investment goals and objectives.

Investment Authority: We manage investment accounts on a **discretionary** basis whereby **we will decide** which investments to buy or sell for your account. You may limit our discretionary authority (for example, limiting the types of securities that can be purchased or sold for your account) by providing our firm with your restrictions and guidelines in writing. In certain circumstances, we may recommend that you engage a TPMM to manage all or a portion of your investment portfolio. The TPMM will have discretionary authority to make investment decisions for the assets it manages. We will retain discretionary authority to select, replace, or reallocate assets among TPMMs where we believe such action is appropriate. We also offer **non-discretionary** investment management services whereby we may provide advice, but **you will ultimately decide** which investments and when to buy and sell for your account. You have an unrestricted right to decline to implement any advice provided by our firm on a non-discretionary basis.

Investment Offerings: We provide advice on various types of investments. Our services are not limited to a specific type of investment or product. When recommending TPMMs, we consider factors including, but not limited to, the TPMM's performance history, methods of analysis, fees, your financial needs, investment goals, risk tolerance, and objectives.

Account Minimums and Requirements: In general, we do not require a minimum dollar amount to open and maintain an advisory account.

Detailed information regarding our services, fees and other disclosures can be found in our Form ADV Part 2A Items 4, 7, and 8 by clicking this link <https://adviserinfo.sec.gov/firm/summary/316644>.

Key Questions to 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?**

What fees will I pay?

The following summarizes the principal fees and costs associated with engaging our firm for advisory services.

- **Asset-Based Fees** - Since the fees we receive are asset-based (*i.e.*, based on the value of your account), we have an incentive to increase your account value which creates a conflict. Our annual asset-based fees range from 0.75% to 1.5% of assets under management, and are negotiable. Financial planning and consulting is provided at no charge for our asset management clients. These fees are billed monthly in advance and are based on the average daily balance for the preceding month. These fees are debited directly from your account(s). If you engage a TPMM, you will pay advisory fees to both our firm and the TPMM. TPMM fees are separate from and in addition to our advisory fees. We do not charge a separate fee for selecting TPMMs, and we do not share in the advisory fees you pay directly to a TPMM. Because you pay multiple advisory fees, your total cost may be higher

when a TPMM is used.

- **Financial Planning & Consulting Hourly Fees** - Payable in advance at a rate of \$500 an hour for financial consulting for clients that do not utilize our asset management services.
- **Financial Planning & Consulting Fixed Fees** - Payable as invoiced and typically ranges from \$2,500 to \$15,000 for clients that do not utilize our asset management services.

Examples of the most common fees and costs applicable to our clients are:

- Custodian fees;
- Account maintenance fees;
- Fees related to mutual funds and exchange-traded funds;
- Transaction charges when purchasing or selling securities; and
- Other product-level fees associated with your investments.

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 detailed information, refer to our Form ADV Part 2A Items 5 and 6 by clicking this link <https://adviserinfo.sec.gov/firm/summary/316644>.

Key Questions to 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?**

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.

- Some financial professionals are licensed as independent insurance agents. They will earn commission-based compensation for selling insurance products. This compensation is separate and in addition to our advisory fees.
- Because our revenue is derived from asset-based fees, we have an incentive to grow your account as much as possible. This could cause us to take overly aggressive/conservative positions in conflict with your interests.
- In certain circumstances, we may recommend TPMMs to manage all or portion of your investment portfolio. This creates a conflict of interest because we have discretion to select, replace, or reallocate assets among TPMMs. We do not receive compensation from TPMMs or share in the fees you pay them, and we seek to mitigate this conflict by evaluating TPMMs using objective criteria and monitoring their performance.

Key Questions to Ask Your Financial Professional

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

Refer to our Form ADV Part 2A by clicking this link <https://adviserinfo.sec.gov/firm/summary/316644> to help you understand what conflicts exist.

How do your financial professionals make money?

Financial professionals are paid a salary and/or a portion of the asset management fees you pay us. However, the portion of compensation paid to our financial professionals based on asset management fees involves a conflict of interest because they have a financial incentive to refer clients to our firm.

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

No. Visit Investor.gov/CRS for a free and simple search tool to research our firm and our financial professionals.

Key Questions to Ask Your Financial Professional

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

You can find additional information about your investment advisory services and request a copy of the relationship summary at (949) 682-9105 or click this link <https://adviserinfo.sec.gov/firm/summary/316644>.

Key Questions to Ask Your Financial Professional

- **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?**