

MEYERS WEALTH MANAGEMENT

Meyers Wealth Management

441 California Ave, #7
Palo Alto, CA 94306

<http://www.MeyersMoney.com>

advisor@MeyersMoney.com

1-800-993-2994

Meyers Wealth Management is registered with the State of California as a Registered Investment Adviser.

This is Form ADV Part 3, also known as Form CRS (“Client Relationship Summary”) intended to disclose information about how our firm works with our clients in “plain English”. More details, including fee schedules, are available in our Form ADV Part 2 (“Firm Brochure”).

You can learn more about RIAs, Broker-Dealers, and you can research firms and financial professionals at <http://investor.gov/CRS>

Meyers Wealth Management,
CRD Number 148734

This document was last updated on June 30, 2020.

IS AN INVESTMENT ADVISORY RELATIONSHIP RIGHT FOR YOU?

There are different ways you can get help with your investments. You should carefully consider which types of accounts and services are right for you.

We are an investment adviser and provide advisory services rather than brokerage accounts and services. This document gives you a summary of the types of services we provide and how you pay for them. Please ask us for more information. There are some suggested questions in this document.

RELATIONSHIPS AND SERVICES

We work with clients in two ways: (1) hourly consultation; and (2) ongoing comprehensive financial planning and portfolio management.

For hourly services, we meet with clients, provide guidance (either during meetings, through notes and/or other communication), and it is up to the client to implement and follow up. For this we get paid by the hour.

For ongoing comprehensive planning and portfolio management, you will pay an on-going asset-based fee at the beginning of each quarter for our services based on the value of cash and investments in your accounts under our management. We will offer advice on a regular basis, discuss investment goals, design a strategy to achieve those goals, monitor your accounts, and contact you (by phone or e-mail) at least quarterly to discuss these matters. Managed accounts allow us to buy and sell investments within your account without asking you in advance (a “discretionary account”).

Our investment advice will cover a limited selection of investments. Other firms may provide advice on a wider range of choices, some of which may have lower costs.

OUR OBLIGATIONS TO YOU

We must abide by certain laws and regulations in our interactions with you.

We are held to a fiduciary standard that covers our entire investment advisory relationship with you. This means that we have to act in your best interest at all times and not put our interests ahead of yours.

Our interests can conflict with your interests. We must eliminate these conflicts of interest or tell you about them in a way you can understand so that you can decide whether or not to agree with them.

FEES, COSTS, CONFLICTS, AND STANDARD OF CONDUCT

Fees and costs affect the value of your account over time. You will pay fees and costs whether you make or lose money on your investments. Please make sure you understand the fees and costs you are paying.

The amount paid to our firm and your financial professional generally does not vary based on the type of investments we select on your behalf. The asset-based fee reduces the value of your account and will generally be deducted directly from your account.

Some investments (such as mutual funds) impose additional fees that will reduce the value of your investment over time.

Our fees vary and are negotiable. The amount you pay will depend, for example, on the services you receive and the amount of assets in your accounts (or, for hourly services, the billable time spent).

You may pay a transaction fee when we buy or sell an investment for you and you may pay fees to the broker-dealer or bank that actually holds your assets (called "custody"). We try to minimize these additional costs.

The more assets you have in your managed accounts, including cash, the more you will pay us. We therefore have an incentive to increase the assets in your accounts in order to increase our fees. We mitigate this by ensuring that all recommendations and investment decisions we make are in your best interest. You pay our fee quarterly even if we do not buy or sell anything in the account in that quarter.

DISCIPLINARY HISTORY

None.

SOME QUESTIONS TO ASK

"Given my financial situation, should I choose an investment advisory relationship? Why or why not?"

"How will you choose investments for me?"

"What is your relevant experience, including licenses, education, and other qualifications? What do those qualifications mean?"

"How do you make money and how might that conflict with my own interests? Can you give me some examples of those conflicts?"

"What services will I receive for those fees?"