

FORM CRS – CUSTOMER RELATIONSHIP SUMMARY

ITEM 1: INTRODUCTION

FourStar Wealth Advisors, LLC (“FourStar”) is registered with the Securities and Exchange Commission (SEC) as an investment adviser. Brokerage and Investment Advisory services 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 www.investor.gov/crs, which also provides educational materials about broker-dealers, investment advisers, and investing.

ITEM 2: RELATIONSHIPS AND SERVICES

What investment services and advise can you provide me?

Services: We provide fee-based, separate account investment advisory services directly to individuals, high net worth individuals, trusts, charitable organizations, and other individual and institutional investors. We also manage investment models and client accounts, either in-house or third parties who are unaffiliated with us.

Monitoring: We offer advice on a regular ongoing basis. We will discuss your investment goals, design a strategy to achieve your investment goals, and regularly monitor your account to meet those goals. We will contact clients when we become aware of significant changes in the market, as well as respond to a client’s unsolicited investment request. There is not additional charge for this ongoing service.

Investment Authority: We buy and sell investments, with discretionary authority, in your account in accordance with your stated investment guidelines.

Investment Offerings: Our investment advice is not limited to a security. We provide advice with respect to equities, fixed income, cash investments, alternatives, philanthropic planning.

CONVERSATION STARTERS

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?*

ITEM 3: FEES, COSTS, CONFLICTS, AND STANDARD OF CONDUCT

What fees will I pay?

Retail investors will incur fees for investment advisory services: 0.25%-2.00% asset-based fees are either flat or scale or a combination of both when a financial plan is maintained; project-based fees are flat. The more assets there are in a retail investor’s account, the more a retail investor will pay in fees, and the firm therefore has an incentive to increase the assets in the retail investors account. In addition to the advisory fees paid to FourStar, clients are also responsible for certain charges imposed by other third parties, such as broker-dealers, custodians, trust companies, banks, and other financial institutions. We offer insurance products under a separate commission-based arrangement. We bill fees in advance on a quarterly basis. 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.

CONVERSATION STARTERS

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?*

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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. Fund Families occasionally sponsor marketing or other client events for the Firm by paying a portion of the expenses for the events (“Sponsorships”). These Sponsorships create a conflict of interest because the firm has an incentive to invest client assets in financial products provided by the Fund Families. However, Sponsorships from any of the Fund Families are not tied in any way to the Firm’s decision-making process of investing client assets into the financial products provided by the Fund Families. The Firm addresses this conflict of interest by disclosing which Fund Families the Firm works with and by only making such investments in the best interest of its clients without consideration of any Sponsorships.

CONVERSATION STARTERS

Ask your financial professional

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

For additional information, please see Form ADV, Part 2A brochure, www.investor.gov/crs.

How do your financial professionals make money?

Supervised Financial Professionals are compensated a percentage of the fees collected from their client’s accounts. They are compensated based on whether the client’s asset-based fees are either flat or scale or a combination of both. The more assets there are in a retail investor’s account, the more a retail investor will pay in fees, and the firm therefore has an incentive to increase the assets in the retail investors account. Additionally, some of the Firm’s Supervised Financial Professionals, in their individual capacities, offer insurance products under a separate commission-based arrangement.

ITEM 4: DISCIPLINARY HISTORY

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

Yes, some of our supervised financial professionals have disclosures. Visit www.investor.gov/crs for a free and simple search tool to research you and your financial professionals

CONVERSATION STARTERS

Ask your financial professional

- *As a financial professional, do you have any required disclosures? If so, for what type of conduct?*

ITEM 5: ADDITIONAL INFORMATION

Additional information

For additional information about our services you may visit, www.investor.gov/crs. If you would like additional, up-to-date information or a copy of this disclosure, please call 1-800-888-5164

CONVERSATION STARTERS

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?*