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Introduction

Intentional Wealth Advisors, LLC dba Intentional Wealth Planning ("We", or "Our") is an investment adviser registered with the Securities and Exchange Commission. 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 www.investor.gov/CRS, which also provides educational materials about broker dealers, investment advisers, and investing.

Relationships and Services

What investment services and advice can you provide me?

Our firm primarily offers portfolio management investment advisory services to retail clients and financial planning. Your investment adviser representative periodically reviews the general holdings of his/her client accounts. Each investment adviser representative also meets with clients on an annual basis to review their financial situations. Our firm has discretionary management without any material limitations.

We do not limit the types of investments that we recommend, although you may propose restrictions in writing, which we will attempt to honor. Our firm does not have a minimum account size. Please also see our Form ADV Part 2A ("Brochure"), specifically Items 4 & 7. We actively and continuously monitor your account.

Conversation Starters: *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?*

Fees, Costs, Conflicts, and Standard of Conduct

What fees will I pay?

Fees and costs affect the value of your account over time and vary depending on certain factors and are negotiable. Please ask our representative to give you personalized information on the fees and costs you will pay. Our asset-based fees for investment management range based on your assets under management but are not to exceed 1.95% annually. Our incentive is to increase the value of your account over time, which will increase our fees over time.

The broker-dealer ("custodian") that holds your assets can charge you a transaction fee when we buy or sell an investment for you. These transaction fees are in addition to our advisory fee. You could also pay fees charged by the custodian for certain investments and maintaining your account. Some investments, such as mutual funds and exchange traded funds charge additional fees that will reduce the value of your investments over time.

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. Please refer to Item 5 of our Form ADV Part 2A for further information.

Conversation Starters: *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 interests 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.

The firm is operated by a sole investment adviser representative. We do not sell insurance products, receive insurance commissions, or act as an insurance agent. We earn revenue solely from the advisory fees paid by our clients. Because our advisory fee is based on the amount of assets we manage, we have an incentive to encourage you to increase the assets in your account, including by transferring or rolling over assets to an account that we manage. The more assets we manage, the more you will pay us in advisory fees.

Disciplinary History

Do you or your financial professionals have legal or disciplinary history? No. You can visit www.investor.gov/CRS for a free and simple search tool to research our firm and our financial professionals.

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

Additional Information

You can find additional information about our investment advisory services by viewing our Form ADV Part 2A available via IAPD - Investment Adviser Public Disclosure - Homepage. You can request up to date information and a copy of our Client Relationship Summary by contacting Douglas Vowels at (888) 688-4097.

Conversation Starters: *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?*