

**Form CRS – Client Relationship Summary**  
**Condon Wealth Management, Inc.**  
**Date: May 29, 2026**

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**Introduction**

Condon Wealth Management, Inc. is registered with the Securities and Exchange Commission as an investment adviser. 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 help you research firms and financial professionals at [Investor.gov/CRS](https://investor.gov/CRS), which also provides educational materials about investment advisers, and investing.

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

We offer investment advisory services to retail investors, including Individual Portfolio Management, Portfolio management services through a wrap-fee program, Turnkey Asset Management Programs, Manager of Managers, Financial Planning & Consulting Services.

**Monitoring:** Accounts are continuously monitored and reviewed at least annually.

**Investment Authority:** We have the authority to make investment decisions including buying and selling securities on your behalf, without prior consultation. You may place limitations on this discretionary authority by providing written instructions that outline specific restrictions or guidelines, such as the types of securities that may or may not be included in your account. In addition, we offer non-discretionary authority (per prior client approval).

**Limited Investment Offerings:** Our investment advice may include recommendations across a broad range of securities, including exchange-listed equities, mutual funds, 529 plans, corporate and U.S. government debt, variable insurance products, and real estate focused partnership interests.

**Account Minimums and Other Requirements:** We charge a minimum [annual] fee in the amount of \$100 to open and maintain an advisory account. At our discretion we may waive the minimum fee.

For clients whose allocations include standalone accounts invested only in US Gov't Bond Ladders, our annual management fee is 0.10%. For clients whose allocations include standalone accounts invested only in Fixed Income SMAs, our annual management fee is 0.35%.

When utilizing certain TAMPs, as described in Item 4 of ADV Brochure, the sponsor of the program may impose account minimums.

*Detailed information regarding our services, fees and other disclosures can be found in our Form ADV Part 2A Items 4 and 7 by clicking this link: <https://adviserinfo.sec.gov/firm/brochure/128409>.*

**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?***

**What fees will I pay?**

You may pay an asset-based, fixed, or hourly fee, as agreed:

- **Asset-based fees:** Are calculated quarterly and paid in advance based on the prior quarter's average daily account value. We are incentivized to grow your account, which may present a conflict of interest for illiquid or hard-to-value assets.
- **Fixed and hourly fees:** Billed quarterly in advance.

**Additional costs:** You may also incur fees from custodians, account maintenance fees, transaction charges, mutual funds and ETFs fees, other product-level investment costs or other third-party providers.

**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/brochure/128409>.

**Conversation Starter: 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 is an example to help you understand what this means.**

- We receive commissions from securities or insurance sales in addition to advisory fees, which creates a conflict of interest. You are not required to purchase securities or insurance products through any affiliated person of our firm.

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

Refer to our Form ADV Part 2A Brochure by clicking this link <https://adviserinfo.sec.gov/firm/brochure/128409> to help you understand what conflicts exist.

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

The financial professionals servicing your account(s) receive compensation through a combination of salary, performance-based bonuses, and a share of advisory fees, which is determined by the total value of client assets they manage.

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

No, our firm and our financial professionals currently do not have any legal or disciplinary history to disclose. Visit [Investor.gov/CRS](http://Investor.gov/CRS) for a free and simple research tool.

**Conversation Starter: 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 508-746-7763 or click the link provided <https://adviserinfo.sec.gov/firm/brochure/>.

**Conversation Starter: 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?**