

Form ADV Part 3 – Client Relationship Summary

Date: 02/01/2021

Registrants Name Wiser Retire, LLC

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Las Vegas, NV 89135

702-996-7587

Item 1: Introduction

Wiser Retire LLC is an investment adviser registered with the Securities and Exchange Commission offering advisory accounts and services. Brokerage and investment advisory services and fees differ, and it is important that you understand the differences. This document gives you a summary of the types of services and fees we offer. Please visit www.investor.gov/CRS for free, simple tools to research firms and for educational materials about broker-dealers, investment advisers, and investing.

Item 2: Relationships and Services

Questions to ask us: 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 investment services and advice can you provide me? Wiser Retire offers online financial planning through our online portal. All technology is powered by RightCapital.com, Riskalyze.com, Lifyield.com, and Taxclarity.com. All new clients can sign up for a free account and have access to all the budgeting, goal tracking, investment risk assessment, fee assessment, retirement planning, social security planning, medicare planning and tax planning. We do not directly advice or recommend investments, models or portfolios to invest into. The online technology will allow you to test different models based on your unique financial situation. Please also see our Form ADV Part 2A ("[Brochure](#)"), specifically Items 4 & 7. To clarify, we do not have direct or indirect discretion on your investments. It is up to you to set up your own accounts at whatever custodian you desire.

Item 3: Fees, Costs, Conflicts, and Standard of Conduct

Questions to ask us: Help me understand how these fees and costs might affect my investments. If I give you \$10,000 to invest, how much will go toward fees and costs, and how much will be invested for me? How might your conflicts of interest affect me, and how will you address them?

What fees will I pay? The "client", can sign up for a free online account or request a data input assistant. In no way does the data input assistant possess the skills or ability to render any financial advice and can only

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assist in getting the system set up and depending on the subscription service, keeping the data maintained. Currently the fee for a basic sign up is free, a simple set up is \$299.00, an advanced set up is \$599.00 and Data Upkeep is between \$15.95 a month to \$29.95 a month depending on your asset level.

What are your legal obligations to our firm when acting as my investment adviser?

Our legal obligations are to keep a cyber-security protocol in effect and to help you with the data only. It is the clients responsibility to choose the investments and to know what they risks are by using the online technology.

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 present time we may refer you to other investment advisors if your desired service does not meet our ability through our technology. At the present time we do not accept any referral fees for this direct referral.

How do your financial professionals make money? Primarily, our firm receives fees through the subscription services for data input, but all advisors receive a salary thus striving to reduce any conflict of interest or recommendations which may increase compensation.

Item 4: Disciplinary History

Questions to ask us: As a financial professional, do you have any disciplinary history? For what type of conduct?

Do you or your financial professionals have legal or disciplinary history? We do not have legal and disciplinary events. Visit <https://www.investor.gov/> for a free, simple search tool to research us and our financial professionals.

Item 5: Additional Information

Questions to ask us: 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?

You may send a direct email to support@wiserretire.com if you are on the free version. If you are a paid subscriber we do offer a phone support option by calling 1-315-947-3695 This support is only to assist in the online technology and does not include any investment advice.

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Exhibit A – Material Changes to Client Relationship Summary

This is the initial version of the Client Relationship Summary. There are no material changes.