Form CRS “Client Relationship Summary”
Legacy Wealth Management, LLC
March 30, 2026

Item 1: Introduction

LEGACY WEALTH MANAGEMENT, 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 financial professionals, as well as educational materials about broker-dealers, investment advisers, and investing.

Item 2: Relationships and Services

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?
What investment services and advice can you provide me?

As part of our standard services, we monitor client accounts on an ongoing basis and we review accounts at least annually and more frequently as appropriate.

Our firm has discretionary management without any material limitations. We limit the types of investments that are recommended since not every type of investment vehicle is needed to create an appropriate portfolio, but do not limit these investments to proprietary products. Our firm does not have a minimum account size. Please also see our Form ADV Part 2A (“Brochure”), specifically Items 4 & 7.

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

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

What fees will I pay?
Our fees generally range up to 2% annually depending on the services and investment strategy selected.
For certain alternative investments, we may charge an additional fee of up to 0.50%.

Performance based fees can be negotiated between a qualified client and an Advisor. Please see our ADV Part 2A, Item 5 and Item 6 for more information.

Fees may be negotiated based on factors such as the size of the account and the services provided.

You pay our fees even if you do not have any transactions and the advisory fee paid to us generally does not vary based on the type of investments selected. Please also see Items 4, 5, 6, 7 & 8 of our Brochure.

Some investments (e.g., mutual funds, variable annuities, etc.) impose additional fees (e.g., transactional fees and product-level fees) that reduce the value of your investment over time. The same goes for any additional fees you pay to a custodian. Additionally, you will pay transaction fees, if applicable, when we buy or sell an investment for your account. 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 also see our Brochure for additional details.

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

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. For example, we earn fees based on the amount of assets in your account, which creates an incentive for us to encourage you to increase the assets we manage.

How else does your firm make money and what conflicts of interest do you have?

In certain circumstances, the firm or its representatives may receive compensation from third parties related to certain investments. This creates a conflict of interest because it may create an incentive to recommend those investments. We disclose these conflicts and seek to mitigate them in accordance with our fiduciary duty.

How do your financial professionals make money?

For AUM fees, the more assets you have in your advisory account, the more you will pay us and thus we have an incentive to increase those assets in order to increase our fee. In certain cases, financial professionals may also receive compensation related to insurance products or other investment recommendations, which creates a conflict of interest.

Item 4: Disciplinary History

Conversation Starter:

Do any advisers within Legacy Wealth Management have a legal or disciplinary history?

Yes. We encourage you to visit Investor.gov/CRS for a free and simple search tool to research any of our financial professionals.

Item 5: Additional Information

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?

You can find additional information regarding our firm in our Form ADV Part 2A "Firm Brochure" by visiting www.adviserinfo.sec.gov and searching for our firm by its name or our unique CRD number (174767). You can obtain a copy of this relationship summary by contacting our main office at 208-955-0500. If you have a problem with your investments, investment account, or a financial professional, please contact us in writing at 13965 W. Chinden Blvd., #100, Boise, ID 83713. For additional information about our financial professionals, visit https://brokercheck.finra.org/ for a free and simple search tool to research our firm and our financial professionals. To report a problem to the SEC, visit Investor.gov or call the SEC's toll-free investor assistance line at (800) 732-0330.