



## Form CRS – Client Relationship Summary

### Introduction

Insight Wealth Strategies, LLC, is an investment adviser registered with the Securities and Exchange Commission. We feel that it is important for you to understand how advisory and brokerage services and fees differ in order to determine which type of account is right for you. There are free and simple tools available to research firms and financial professionals at [www.investor.gov/CRS](http://www.investor.gov/CRS), which also provides educational materials about investment advisers, broker-dealers and investing.

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

We are a registered investment adviser that offers investment advisory and financial planning services to retail investors. Our advisory services include Asset Management for which we charge an ongoing asset-based fee. If you open an advisory account with our firm, we will meet with you to understand your current financial situation, existing resources, goals, and risk tolerance. Based on what we learn, we will recommend a portfolio of investments that is managed on an ongoing basis and rebalanced to meet your changing needs, stated goals and objectives. We will offer you advice on a regular basis and typically meet quarterly, but at least annually to review your portfolio. Financial planning is offered as a separate service for an additional flat and/or hourly fee.

We manage accounts on a discretionary basis. After you sign an agreement with our firm, we're allowed to buy and sell investments in your account without asking you in advance. Any limitations will be described in the signed advisory agreement. We will have discretion until the advisory agreement is terminated by you or our firm.

We do not restrict our advice to limited types of products or investments. Our firm does not impose requirements for opening and maintaining accounts or otherwise engaging us, except when using our firm's proprietary investment strategies (All-Cap Growth and Large-Cap Dividend strategies) both of which have a minimum account size of \$70,000.

Additional information about our advisory services is located in Item 4 of our Firm Brochure, which is available online at <https://adviserinfo.sec.gov/firm/summary/293644>.

### 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 those qualifications mean?

### What fees will I pay?

Our Firm charges a fee as compensation for providing investment advisory services on your account. The management fee includes portfolio management, supervision, trade entry, and other account service activities. Our management fees are based on a percentage of the total account value. Our maximum annual advisory fee is 1.0%, billed in arrears on a quarterly basis. Given that our advisory fee is based on total assets under management, we have an incentive to encourage you to increase the amount of assets you have under our management.

The custodian that holds your assets may charge you a transaction fee when we buy or sell an investment for you. The custodian's transaction fees are in addition to our firm's fees for our Asset Management service. You may also pay charges imposed by the custodian holding your accounts for certain investments and maintaining your account. Some investments, such as mutual funds, index funds, and exchange traded funds charge additional fees that will reduce the value of your investments over time. The custodian that holds your assets may also charge a termination fee. In certain cases, we may refer you to third-party money managers, sub-advisers, and/or separate account managers who will assist us with managing your account. If selected, they will charge you a fee, which will be described to you in their Form ADV and/or agreement.

**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.**

Additional information about our fees is located in Item 5 of our Firm Brochure, which is available online at: <https://adviserinfo.sec.gov/firm/summary/293644>.

**Questions to Ask Us:**

- Help me understand how these fees and costs may 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 are some examples to help you understand what this means:

Our firm recommends the custodial services of Fidelity Brokerage Services, LLC ("Fidelity"). Fidelity makes certain research and brokerage services available to our firm at no cost. These services create a conflict of interest as we are incentivized to recommend Fidelity to our clients for custodial services.

Additional information about our conflicts of interest is located in Item 10 and 12 of our Firm Brochure, which is available online at <https://adviserinfo.sec.gov/firm/summary/293644>.

**Questions to Ask Us:**

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

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

Our financial professionals are compensated based on the revenue our firm earns from their advisory services or recommendations, the amount of client assets they service, and the time and complexity required to meet a client's needs.

**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?**

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

**Additional Information**

You can find additional information about our firm's investment advisory services on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching CRD #293644. You may also contact our firm at 925-659-8020 to request a copy of this relationship summary and other up-to-date 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?