

EPG WEALTH MANAGEMENT, LLC.

CUSTOMER RELATIONSHIP SUMMARY (FORM CRS)

MARCH 2025

EPG Wealth Management LLC ("EPG Wealth") is registered with the Securities and Exchange Commission (SEC) as a Registered 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 research firms and financial professionals at [Investor.gov/CRS](https://www.investor.gov/crs), which also provides educational materials about broker dealers, investment advisers, and investing.

WHAT INVESTMENT SERVICES AND ADVICE CAN YOU PROVIDE FOR ME?

EPG Wealth engages in investment advisory services for retail and institutional investors, giving continuous advice based on the client's individual needs. EPG Wealth provides its clients with discretionary and non-discretionary account ("Account") management services tailored to each client's individual needs. In a discretionary account, the Adviser will have the authority to determine which securities are bought and sold without prior consultation with the client. Discretion is exercised in a manner consistent with the client's stated objectives, and any restrictions the client provides in writing. In a non-discretionary account, the client makes the ultimate decision regarding the purchase or sale of investments. The minimum account size is \$500,000 but may be negotiated in certain instances. As part of our standard service, we are responsible for performing ongoing reviews and consulting with you at least annually. EPG Wealth offers Peak accounts which is a wrap fee program. In a Peak account, the client pays a single fee that covers the advisory services and the execution of transactions through our custodian. Clients that anticipate trading primarily in equities and ETFs are typically recommended to open a wrap fee account; clients that anticipate trading in mutual funds with little or no anticipated trading in equities and ETFs will be recommended to open a non-wrap fee account. EPG Wealth also offers financial planning which can provide the client with a written financial plan addressing personal financial goal; current and projected assets, liabilities, and income; anticipated spending needs over time; tax realities (income, capital gains and estate); retirement goals; estate and legacy plans; and any other financial/investment needs. Once a financial plan is delivered, we do not commit to providing on-going monitoring of your assets that are not managed by EPG Wealth. Advisors may also utilize third party managers in managing your account. The client grants discretion to the third-party manager in a separate agreement between the client and the third-party manager. Our Advisors will provide you with the firm's ADV (which outlines the firm's services).

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?"

For additional information, please see our ADV 2A, ADV 2B, and our website: www.eastpacesgroup.com

WHAT FEES WILL I PAY?

EPG Wealth charges clients an annualized asset-based fee, billed monthly or quarterly based on the client's written agreement. The actual fee paid is set forth in an Investment Advisory Agreement. The asset-based fee is calculated as a percentage of the assets we manage for you. The asset-based fee reduces the value of your account and will be deducted from your account on a monthly or quarterly basis. If you choose financial planning, whether you engage us for ongoing advisory services or not, we may charge either a fixed fee or flat hourly fee, depending on the nature and complexity of your circumstances and the level of work it entails. As the first step in the financial planning process, all fees will be disclosed and agreed upon in the financial planning agreement signed by the client before work begins. If you choose a wrap fee program, the asset-based fees associated with the wrap fee program will include most transaction costs and fees to a broker-dealer or bank that has custody of these assets, and therefore are higher than a typical asset-based advisory fee. Aside from the fees we charge you for providing investment advice, you may have to pay other fees related to brokerage or investment advisory services. Fees can be charged directly or indirectly. Direct fees include transaction fees and account maintenance fees (including IRA fees) charged by the custodian that holds your account, prime broker fees, deferred sales charges, odd-lot differentials, transfer taxes, wire transfer and electronic fund fees, and other fees and taxes on brokerage accounts and securities transactions. Indirect fees include internal management fees (including 12b-1 fees and annual fund operating expenses) charged by mutual funds and exchange traded funds, which are disclosed in a fund's prospectus. The more assets there are in your account, the more you will pay in fees, and the firm may have an incentive to encourage you to increase the assets in your account. Your financial professional is permitted to recommend the use of third-party money managers where additional fees may apply. 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.

Ask your financial professional— 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 PROVIDING RECOMMENDATIONS AS MY INVESTMENT ADVISER? HOW ELSE DOES THE FIRM MAKE MONEY AND WHAT CONFLICTS OF INTEREST DO YOU HAVE?

When we act as your investment adviser, we must act in your best interest and not put our interest ahead of you. 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 affect the recommendations we provide you. Most investment adviser representatives are also registered representatives of Arkadios Capital, a registered broker-dealer. Clients may purchase securities through broker-dealers in initial public offerings, secondary offerings, and special purpose acquisition company transactions. If Arkadios Capital acts as a member of the selling syndicate for such offerings, Arkadios Capital will receive compensation. Advisors, acting as a Registered Representative of Arkadios Capital, receive compensation from the sale of an initial public offering (IPO). The advisory fee is not reduced to offset this compensation. This poses a conflict of interest for those individuals as they have a financial incentive to recommend IPO purchases. However, EPG Wealth and its personnel are constrained by fiduciary principles to act in the client's best interest and will only recommend IPO's when they are believed to be suitable. Certain Advisors are separately licensed as insurance agents/brokers for various independent insurance companies. In their capacities as registered representatives or as independent insurance agents, clients will be charged separately from their advisory services. EPG Wealth clients are not obligated to purchase any recommended insurance products. This poses a conflict of interest to the extent that there is a financial incentive to recommend insurance products that result in commissions, trails, or other payments. Clients to whom EPG Wealth offers advisory services are informed that they are under no obligation to use the Firm's IARs for insurance services and may use an insurance agent of their choosing. Your financial professional could favor his/her larger clients when deciding whom to contact regarding investment decisions in times of a volatile or active market. Your financial professional is allowed to negotiate the fee they charge, which will result in different clients paying different fees for similar services. Your financial professional is compensated by charging a fee based on a percentage of the value of your account, rather than for each transaction you make. This could result in higher compensation to your financial professional than would be paid in a non-advisory account. The firm and its advisor will make more money as the assets in your account increase. For additional information, please see our ADV 2A, ADV 2B, and our website: www.eastpacesgroup.com.

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

HOW DO YOUR FINANCIAL PROFESSIONALS MAKE MONEY?

Your financial professional receives a percentage of the asset-based fee and wrap fee as described above, which means your financial professional will receive a greater percentage of the asset-based fee as the revenue generated by your financial professional increases. As some Advisors engage in financial planning, they may receive compensation from those clients (who may or not have advisory accounts with the firm). Financial planning may be provided for a lump sum or an hourly wage depending on the agreement with the client.

DO YOU OR YOUR FINANCIAL PROFESSIONALS HAVE LEGAL OR DISCIPLINARY HISTORY?

Yes, please visit Investor.gov/CRS for a free and simple search tool to research us and our financial professionals. Specific information on our firm and financial professionals can be found at <https://adviserinfo.sec.gov/>.

Ask your financial professional— As a financial professional, do you have any disciplinary history? For what type of conduct?

ADDITIONAL INFORMATION

For additional information about our services, you can access our web site www.eastpacesgroup.com. To request a copy of the relationship summary, you may call 404-809-3680.

When considering our services, ask your financial professional: Who is my primary contact person? Is she or he 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?