

**Burpee Del Simone Wealth Management LLC**  
**Form CRS Customer Relationship Summary**  
**October 30, 2020**

**Introduction**

Burpee Del Simone Wealth Management LLC is a state registered investment advisory firm. 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 me?**

We offer investment advisory services to retail investors, including buying and selling securities such as stocks, options, mutual funds, Exchange Traded Funds (ETFs) and Bonds. We offer advice and recommendations for these investments based on the information you provide. Once we have discussed a portfolio strategy and you have provided approval to implement the Investment transactions, the account will be managed on a discretionary basis. This means that we will enter transactions to buy or sell securities without first discussing the transactions with you. For additional information, please contact us.

*Conversation Starters to 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?**

Transactions Fees:

- Annual assets under management fee is between 1% to 2%
- Fees are billed at the end of each month and deducted from your account.

Transactions Fees:

- Stocks & ETF Trades: 0.02 cents per-share.
- Option Trades: 1.50 for each option contract bought or sold.
- Mutual Funds: 10.00 for each buy and sell order placed.

Custodian Account Fees:

Interactive Brokers LLC:

- Accounts with less than a \$100,000 total balance will be charged a 10.00 dollar monthly fee except for months when the commission cost from transactions is 10.00 dollars or more.
- Outgoing wire transactions: One free wire per month, additional wires cost 10.00 dollars each.

You will pay fees and cost 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.

*Conversation Starter. 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 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 recommendations, we provide you. Here are some examples to help you understand what this means.

An example of a potential conflict might be an investment or services offered by one of our related sister companies.

*Conversation Starter. 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?**

Our financial professionals earn a portion of the annual assets under management fee.

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

No. Visit [Investor.gov/CRS](http://Investor.gov/CRS) for a free and simple search tool to research us and our financial professionals.

*Conversation Starter. 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, contact Robert Burpee at 617-848-4502.

*Conversation Starter. Ask your financial professional—*

- *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?*