

We have had material and noteworthy revisions to our ADV Part 2A since our last annual updating amendment on March 28, 2023. In particular, we note the following:

- We have revised our fee arrangements with new clients to charge them fixed fees rather than asset-based strategy fees. Please refer to Item 5 for additional information.
- On August 31, 2023, funds affiliated with Clayton, Dubilier & Rice, LLC (“CD&R”) and Stone Point Capital LLC (“Stone Point”) completed an acquisition of Focus Financial Partners Inc. (“Focus Inc.”). This transaction resulted in funds affiliated with CD&R collectively becoming majority owners of Focus Inc. and funds affiliated with Stone Point collectively becoming owners of Focus Inc. Because Connectus Wealth, LLC is an indirect, wholly-owned subsidiary of Focus Inc., the CD&R and Stone Point funds are indirect owners of Connectus Wealth, LLC. Items 4 and 10 have been revised to reflect this new ownership structure.

Clients are always encouraged to review the updated ADV in its entirety.