



Brookline

WEALTH

BROOKLINE WEALTH, LLC – Form CRS (Client Relationship Summary)

Date: April 20, 2026

Item 1: Introduction

BROOKLINE WEALTH, LLC is an investment adviser 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

What investment services and advice can you provide me? Our firm primarily offers portfolio management and integrated wealth advisory oversight to retail clients. As part of our Wealth Advisory Oversight Services, we provide ongoing portfolio management based on your individual goals, as well as integrated services which include: general financial oversight and accounting services, insurance review, wealth transfer and estate planning, trust advisory services, and philanthropy.

We monitor client accounts as part of our standard services, generally on an annual basis. We offer both discretionary advisory services (where we make the decision regarding the purchase or sale of investments) and non-discretionary services (where you make the ultimate decision). We primarily offer advice on exchange-traded funds (ETFs) and mutual funds, but we do not limit our recommendations to specific types of investments. Our firm does not have a minimum account size.

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 these qualifications mean?

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

What fees will I pay? Our Wealth Advisory Oversight Fee is a quarterly fixed fee, generally ranging from \$3,000 to \$750,000 per year. This fee is typically charged quarterly in advance. Because we charge a fixed fee based on the amount of work we expect to perform, we have a conflict of interest; we have an incentive to encourage you to agree to more complex work to increase our fee.



In addition to our fees, you will pay other costs to third parties, such as custodian fees, brokerage commissions, mutual fund transaction fees, and product-level fees that reduce the value of your investment over time. 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.

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. For example, we receive soft dollar benefits from our custodian (Charles Schwab), such as research and technology, which gives us an incentive to require you to use that specific custodian.

How do your financial professionals make money? Our financial professionals receive cash compensation from the advisory fees we receive from you.

Questions to ask us:

- 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?

Item 4: Disciplinary History

Do you or your financial professionals have legal or disciplinary history? Yes. We have legal and disciplinary history. Visit www.investor.gov/CRS for a free, simple search tool to research our firm and our financial professionals.

Questions to ask us:

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

Item 5: Additional Information

Who is my primary contact person? Adam Hull is your primary contact person. He is a representative of Brookline Wealth, LLC, an investment adviser.

For additional information on our advisory services, see our [Brochure](#) at <https://adviserinfo.sec.gov/firm/summary/322787>. If you have any questions, need additional information, or want another copy of this Client Relationship Summary, please contact us at 512-222-9169.

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?

