

Introduction

Our firm, Axiom Advisory, 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, 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 services to retail investors for an ongoing asset-based fee. Our advisory services include an Open Retainer, an Online Investment Management Service, and Project Retainer services. If you open an advisory account with our firm, we'll meet with you to understand your current financial situation, existing resources, goals, and risk tolerance. Based on what we learn, we'll recommend a portfolio of investments that is regularly monitored, and if necessary, rebalanced to meet your changing needs, stated goals and objectives. We'll offer you advice on a regular basis and contact you at least annually/quarterly to discuss your portfolio. Financial planning is also included in our Open Retainer service. Financial planning is also offered as a separate service as part of our Project Retainer 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.

Our firm requires a minimum account balance of \$50,000 to open and maintain an account for our Online Investment Management service.

Additional information about our advisory services is located in Item 4 of our Firm Brochure. Our Firm Brochure is available online at <https://adviserinfo.sec.gov/Firm/131540>.

What fees will I pay?

You will be charged a fee depending on your arrangement with our firm. Our Open Retainer service ranges between a flat fee of \$5,000 to \$25,000 while our Online Investment Management Service charges a maximum annual fee of 0.50%. The more assets you have in your advisory account, the more you will pay us. We therefore have an incentive to increase the assets in your advisory account in order to increase our fees. Our fees vary and are negotiable. The amount you pay will depend, for example, on the services you receive and the amount of assets in your account. Our firm's fees will be automatically deducted from your advisory account, which will reduce the value of your advisory account.

Our maximum fee for our Project Retainer service is \$325 per hour. We charge an upfront retainer when you sign an agreement for this service.

The broker-dealer that holds your assets charges you a transaction fee when we buy or sell an investment for you. The broker-dealer's transaction fees are in addition to our firm's fees for our Open Retainer and Online Investment Management services.

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. Our Firm Brochure is available online at <https://adviserinfo.sec.gov/Firm/131540>.

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:

We can make extra money by advising you to invest in certain investments, such as proprietary products and systems designed by Alliance of Comprehensive Planners (“ACP”), because they are managed by someone related to our firm. Your financial professional also receives more money if you buy these investments.

Our firm may advise you to invest in certain investments designed by Alliance of Comprehensive Planners (“ACP”) since our Chief Compliance Officer (“CCO”) Michael Skolnick is a member of ACP. Our firm may receive more money if you choose to buy these investments; however, our firm will continue to act in our client’s best interest.

Additional information about our conflicts of interest is located in Item 10 of our Firm. Our Firm Brochure is available online at <https://adviserinfo.sec.gov/Firm/131540>.

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.

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](https://www.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 by searching CRD #131540. You may also contact our firm at (800) 836-4972 to request a copy of this relationship summary and other up-to-date information.

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?
- 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?
- How might your conflicts of interest affect me, and how will you address them?
- 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?
- As a financial professional, do you have any disciplinary history?
- For what type of conduct?