



Kassira Wealth Management

Form CRS – Client Relationship Summary

January 2025

Introduction

Kassira Wealth Management LLC is registered with the U.S. Securities and Exchange Commission (SEC) as an investment adviser. Brokerage and investment advisory services differ, and it is important for you to understand the 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 types of investment services and advice can you provide me?

We offer investment advisory services to retail investors through a wrap fee program, which includes both portfolio management and transaction execution services under a single asset-based fee.

Key Features of Our Services

- **Discretionary Portfolio Management:** We make investment decisions on your behalf based on your investment objectives, risk tolerance, and financial situation.
- **Ongoing Monitoring:** We regularly review and rebalance your portfolio to align with your financial goals.
- **Financial Planning:** We offer financial planning services, including retirement, tax, and estate planning.
- **Investment Offerings:** Our recommendations may include a broad range of investments, such as equities, ETFs, mutual funds, and fixed income securities.
- **No Minimum Account Size:** While we do not impose a firm-wide minimum, some strategies may require a minimum investment amount.

Questions to Ask

- 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 and costs will I pay?

We charge an asset-based wrap fee, meaning you pay a single percentage fee based on your account's value. This fee covers both our advisory services and trading costs associated with executing transactions.

Questions to Ask

- 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 a fiduciary duty to place the interest of our clients ahead of our own and the firm. 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.

Examples of Conflicts of Interest

- We may receive research or technology services from custodians (such as Schwab) at no additional cost, which could create an incentive to recommend their services.
- Our financial professionals are compensated based on the management fees collected from client accounts. Their earnings are directly tied to the total amount of assets we manage, which creates an incentive to grow client assets.
- We do not receive commissions from securities transactions, reducing conflicts of interest related to trading activity.

Questions to Ask

- How might your conflicts of interest affect me, and how will you address them?

Compensation of Our Financial Professionals

Our financial professionals are compensated based on the management fees collected from client accounts. Their earnings are directly tied to the total amount of assets we manage, which creates an incentive to grow client assets. We do not receive commissions from securities transactions, reducing conflicts of interest related to trading activity.

Legal and Disciplinary History


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

Questions to Ask


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

Additional Information

For more information about our advisory services, please see our Form ADV, Part 2A or contact us at:

 Phone: 703-569-8363

 Email: Gassan@Kassira.com

 Website: <https://Kassira.com>

Questions to Ask

- Who is my primary contact person?
- Who can I talk to if I have concerns about how this person is treating me?