



<p>Item 1. Introduction</p>	<p>Tanara Wealth Management, LLC is registered with the Securities and Exchange Commission (SEC) as an investment adviser. 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 <a href="https://investor.gov/CRS">Investor.gov/CRS</a>, which also provides educational materials about broker-dealers, investment advisers, and investing.</p>
<p>Item 2. Relationships and Services</p>	<p><b>What investment services and advice can you provide me?</b> We offer investment management services to retail investors, including financial planning and investment management. Investment management services include ongoing monitoring of your investment portfolio comprised of stocks, bonds, mutual funds, exchange-traded funds (ETFs), options, alternative investments when consistent with client guidelines and objectives, and separately managed accounts managed by independent, Third- Party Managers. Our investment management services often utilize model portfolio allocations comprised of specific investment securities and products; however, we also provide customized portfolio management to certain clients upon request. As a part of our standard services we monitor and advise clients' investment portfolios on an ongoing basis. We will typically be authorized to manage your account(s) with discretionary authority, which means that we will buy and sell investments for you without contacting you in advance. Even when we have discretionary authority, you have the right to request restrictions or instructions on your account(s). Notwithstanding, Tanara does not exercise discretion with respect to Client investments in private funds. Instead, we will recommend a private fund investment and you will retain the authority to decide whether to invest in that private fund. We typically require a minimum portfolio of \$250,000 for investment management services, but reserve the right lower this amount.</p> <p>We offer financial planning services that are comprehensive in nature, which include the development of a financial plan and reviewing it on an agreed upon basis, as well as individual services which may be one-time or ongoing. Your specific agreed-upon services will be set forth in your agreement with us. Our financial planning services have a minimum fee of \$1000.</p> <p><b>Additional information</b> about our services can be found on Part 2A of our Form ADV, which is available at <a href="https://adviserinfo.sec.gov/firm/summary/CRD#">https://adviserinfo.sec.gov/firm/summary/CRD#</a>.</p> <p><b>Conversation Starters.</b> Ask your financial professional—</p> <ul style="list-style-type: none"><li>• <b>Given my financial situation, should I choose an investment advisory service? Why or why not?</b></li><li>• <b>How will you choose investments to recommend to me?</b></li><li>• <b>What is your relevant experience, including your licenses, education and other qualifications? What do these qualifications mean?</b></li></ul>
<p>Item 3.A Fees, Costs, Conflicts, and Standard of Conduct</p>	<p><b>What fees will I pay?</b> You will pay fees based on the types of services you select. These fees will be stated in your agreement with us.</p> <p>Investment management fees are negotiable and typically based on assets under management. Fees are negotiable but will not exceed 1.30% annually. Fees are typically charged quarterly in advance, based on account values at the start of each quarter. Our firm's compensation from fees increases as client accounts grow, so we have an incentive to encourage our clients to increase the amount of assets in the accounts that are under our management. This is a summary only, and additional information about our firm's fees are included in Item 5 of Part 2A of Form ADV, available at <a href="https://adviserinfo.sec.gov/firm/summary/CRD#">https://adviserinfo.sec.gov/firm/summary/CRD#</a>.</p> <p>Other common fees that you will pay for our investment management services include transaction fees and wire transfer fees charged by your custodian, management fees charged by Third-Party Managers, and custodial fees, management fees and other operating expenses associated with certain private fund investments. Additionally, ETFs, mutual funds and certain annuities carry internal management fees and other expenses, which are disclosed in the product's prospectus or disclosure document.</p> <p>Financial planning fees are negotiable and typically are charged as a flat fee, with an option to pay up front or on a quarterly basis in advance and are reviewed annually. Financial planning fees start at \$1,000 per annum.</p>

