BURLING WEALTH PARTNERS, LLC
November 5, 2026

Item 1: Introduction

BURLING WEALTH PARTNERS, LLC ("Burling Wealth Partners", "we", "our") is registered with the United States Securities and Exchange Commission as an investment adviser. Brokerage and investment advisory services and fees 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, which also provides educational materials about broker-dealers, investment advisers, and investing.

Item 2: What investment services and advice can you provide to me?

Burling Wealth Partners provides investment advisory services to individuals, high net worth individuals, and entities, including, but not limited to, family offices, trusts, estates, private foundations, retirement plans, charitable organizations, corporations, other business entities, and pooled investment vehicles. We principally provide wealth management services, which is a combination of investment management and financial planning, and family office services. We may also offer these services on a stand-alone basis. We tailor these services to match your goals and objectives, as well as risk tolerance and financial situation.

We monitor investments and securities in accounts on a regular and continuous basis, unless otherwise agreed, and make adjustments and reallocations as necessary due to changes in market conditions and your circumstances. We generally meet with you annually, or more frequently, depending on your needs.

Our services can be provided on either a discretionary or non-discretionary basis. In providing discretionary management services, we maintain a limited power of attorney to effect securities transactions on your behalf in accordance with your investment objectives. You have the right to limit our discretionary authority by providing us with written communication that details restrictions and other guidelines. Such discretionary authority and engagement will continue until you notify us otherwise in writing. We also offer our services on a non-discretionary basis, whereby we are required to obtain your consent prior to executing any trades on your behalf. In this case, you maintain the ultimate decision-making authority regarding the purchase or sale of investments in your account.

Generally, we do not impose a minimum size for establishing a relationship. Burling Wealth Partners reserves the right to accept or decline a potential client for any reason in its sole discretion.

For additional information, please refer to our Form ADV Part 2A Brochure, especially Item 4: Advisory Business and Item 7: Types of Clients available via our firm's Investment Adviser Public Disclosure Page.

Questions to Ask Us:

- Given my financial situation, should I choose an investment advisory service? Why or why not?
- How will you choose the investments that you recommend to me?
- What is your relevant experience, including your licenses, education and other qualifications? What do these qualifications mean?

Item 3 (part 1): What fees will I pay?

Asset-Based Fees: Our asset-based fees for wealth and investment management services range up to 1.25% annually. This fee will be collected on a quarterly basis and calculated as a percentage of the value of assets we manage and/or advise on as is set forth in the Investment Management Agreement we have with you. This presents a conflict of interest as we are financially incentivized to encourage you to place more assets in your advisory account as you will pay more in advisory fees.

Fixed Fees: Our fixed fees for stand-alone financial planning, investment advisory services, family office, and consultative services are negotiable based on the nature and complexity of the services provided and the overall relationship with us. We will provide you with an estimate of the total cost prior to engaging us for these services. We will collect fees based on your service agreement.

Other Fees and Costs: In addition to our fees, you will be responsible for other fees and expenses, such as, transaction charges and fees/expenses charged by any custodian of your account, subadvisor, mutual fund, exchange traded fund, separate account manager, private funds managers, and any taxes or fees required by federal or state law. If you invest in a pooled investment vehicle that we advise, you will bear that vehicle's fees and expenses as described in its offering documents. You will not pay both our advisory fee and the fund's management fee on the same assets.

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. For additional information, see Item 5: Fees and Compensation of our Form ADV Part 2A Brochure available via our firm's Investment Adviser Public Disclosure Page.

Questions to Ask Us:

- Help me to 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?

Item 3 (part 2): 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 interests ahead of yours. At the same time, the way we make money creates conflicts with your interests. You should understand and ask us about these conflicts because they can affect the investment advice we provide you. As an example, we receive various benefits and services from custodians that we may recommend to you.

We may also advise, and recommend to you, privately offered pooled investment vehicles from which we receive management fees and, in some cases, performance-based fees. This creates a conflict of interest because we have a financial incentive to recommend them. You are not obligated to invest.

For additional information, please refer to our Form ADV Part 2A Brochure, specifically Item 12: Brokerage Practices available via our firm's Investment Adviser Public Disclosure Page.

Questions to Ask Us:

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

Item 3 (part 3): How do your financial professionals make money?

Our financial professionals are compensated based on a salary and variable compensation. Variable compensation may be based on the amount of client assets serviced, revenues generated, individual performance, and firm revenue and profits. Financial professionals compensated pursuant to a variable compensation structure encompassing client assets serviced and firm revenue and profits are subject to a conflict of interest. This means financial professionals have an incentive to increase the asset size in the relationship or solicit new business, taking time away from the day-to-day servicing of current clients.

Item 4: Do you or your financial professionals have a legal or disciplinary history?

No. You can visit Investor.gov/CRS for a free and 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

For additional information about our investment advisory services and to request a copy of our Form CRS, please contact our firm at (312) 825-0262 or visit www.burlingwp.com.

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 a person is treating me?