



## **Customer Relationship Summary**

Kenobi Wealth LLC (CRD# 335087)

Effective Date: 03/12/2026

### **Introduction**

Kenobi Wealth LLC ("Kenobi Wealth") is a registered investment advisor based in New Jersey. We are registered with the New Jersey Bureau of Securities and provide advisory services to retail investors. Free and simple tools are available to research firms and financial professionals at <https://www.Investor.gov/CRS>.

### **Relationships and Services**

What investment services and advice can you provide me?

We offer flat-fee financial planning and investment advisory services, including financial planning, tax strategy, estate coordination, insurance review, and investment management. We monitor your accounts continuously and meet quarterly.

We offer discretionary investment management, meaning we can buy and sell investments on your behalf without asking in advance. We do not have minimum asset requirements but typically serve households with \$100,000+ in investable assets.

*Conversation Starter: "Given my financial situation, should I choose an investment advisory service? Why or why not?"*

### **Fees, Costs, Conflicts, and Standard of Conduct**

What fees will I pay?

We charge a flat monthly fee based on your chosen membership tier—ranging from \$250 to \$600 per month. We do not charge fees based on assets under management and do not earn investment commissions.

You may also incur fees from third-party investment products or custodians (e.g., ETFs or brokerage fees), separate from our advisory fees.

*Conversation Starter: "Help me understand how these fees and costs might affect my investments. What are your legal obligations to me?"*

We are fiduciaries. We must act in your best interest and avoid placing our interests ahead of yours.

Do you or your financial professionals have conflicts of interest?

Some advisors are licensed to offer insurance and may receive commissions from insurance products. We disclose this and only recommend products that align with your best interests.

*Conversation Starter: "How might your conflicts of interest affect me?"*

### **Disciplinary History**

Do you or your financial professionals have legal or disciplinary history?

No. Visit <https://www.Investor.gov/CRS> to research us and our professionals.

*Conversation Starter: "As a financial professional, do you have any disciplinary history?"*

### **Additional Information**

For more information about our services or to request a copy of this relationship summary, please get in touch with us:

Email: [Support@KenobiWealth.com](mailto:Support@KenobiWealth.com)

Website: <https://www.kenobiwealth.com>

Phone: 732.201.2426

*Conversation Starter: "Who is my primary contact person? Is he or she a representative of an investment adviser or a broker-dealer?"*

### **Material Changes (if applicable)**

No material changes have been made since this Form CRS was first published.

**Build Wealth. Fund Dreams.  
Live a life you don't need a vacation from.**