



Material Changes to RVW Wealth Management

Form ADV Update – Material Changes Disclosure

In accordance with SEC regulations, we are notifying you of **material changes** made to RVW Wealth’s Form ADV Brochure (Part 2A), last updated on **June 10, 2026**. These changes reflect updates to the firm’s custodial relationships, brokerage practices, and disclosures related to potential conflicts of interest. The summary of changes includes:

- **Held Away Account Management (Pontera)**
RVW updated its services and fees to reflect the management of held away accounts.
- **Proxy Voting Procedures**
RVW updated its policies to reflect that they accept authority to vote proxies on behalf of clients.
- **Educational Savings Accounts (529 Plans)**
RVW updated its services to disclose assistance with establishing and maintaining 529 college savings plans (such as My529 accounts),
- **Assets Under Management**
RVW updated its assets under management as of May 2026.
- **Minimum Account Fees**
RVW disclosed a minimum annual fee of \$2,500.