

Relationship Summary

We are Keidan Financial Consultants, LLC, an investment adviser registered with the Securities and Exchange Commission. Investment advisory and brokerage 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](https://www.investor.gov/CRS), which also provides educational materials about broker-dealers, investment advisers, and investing. Our firm and financial professionals' registration information are also publicly available on the [Investor.gov](https://www.investor.gov) website.

What investment services and advice can you provide me?

We offer customized investment advisory and financial planning services to retail investors. We offer advice on a full suite of securities. We generally provide discretionary management services, when client approved, which means that we have the power to buy and sell securities for your account without your prior consent, as well as financial planning and consulting to individuals, trusts, and pension plans (our "investment management clients"). This discretionary authority is usually unlimited and remains in effect until you revoke it. We may provide non-discretionary investment advice, where we make the recommendations to you and you decide whether to implement the recommendation. We do not give advice on any proprietary investment products.

We provide continuous and regular supervision of advisory client assets as part of our standard service to you. In addition, we will conduct ad hoc reviews should you change your objectives or risk tolerance, or upon significant market and economic events.

We require a minimum account size of \$250,000, which can be waived at our discretion.

Please visit the [Adviserinfo.sec.gov](https://www.adviserinfo.sec.gov) website for additional information on our firm. Select PART 2 BROCHURES and reference Items 4, 7, and 8 of our Part 2A Brochure for additional information on our services, investment advice, and account requirements.

Other Questions You May Have

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 will I pay?

We provide our investment advisory services on a fee basis. When engaged to provide investment management services, we charge an annual asset-based fee calculated as a percentage of your assets under our management, so our fees will rise and fall with the value of the assets we manage for you. Our annual fees are negotiable and do not exceed 1%. We typically deduct our fee from one or more of your accounts on a quarterly basis in arrears. Because our fee is calculated as a percentage of your assets under management, the more assets you have in your advisory accounts, the more you will pay us for our investment management services. Therefore, we have an incentive for your portfolio to increase in value through the appreciation of assets or through your adding additional funds.

For our advisory programs, you may pay the broker-dealer or bank custodian a nominal ticket charge when we buy and sell investments for you. Under a fee arrangement, the more transactions effected in your account, the potential for more ticket charges paid, and high activity in your account does not assure positive portfolio performance. Certain additional custodial fees paid to the custodian include (as applicable) low balance, check writing, wire, IRA custodial, termination, and overnight delivery fees. Financial planning fees will be charged at a fixed rate as agreed upon by you and the firm.

There are additional fees such as internal fees and expenses charged by mutual funds (i.e., 12b-1 distribution fees and management fees that are assessed within the mutual fund) and exchange-traded funds, product-level fees and commission for insurance-related products, postage and handling, transfer taxes, SEC fees for sales of securities. Also, with certain investments such as variable annuities, you may have to pay fees such as "surrender charges" to sell or redeem the investment

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. **You can find more information about our fees and costs under Item 5 of our Part 2A Brochure, available at [Adviserinfo.sec.gov](https://www.adviserinfo.sec.gov).**

Other Questions You May Have

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 must act in your best interest and not put our interests ahead of yours. 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. As an example, certain KFC professionals are licensed to sell insurance and are registered with Osaic Wealth, Inc., a FINRA broker-dealer, both of which create conflicts of interest regarding compensation.

Additional information regarding conflicts of interest can be found in Items 5, 10, 11, and 14 of our Part 2A Brochure, available at Adviserinfo.sec.gov.

Other Questions You May Have

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

How do your financial professionals make money?

Our financial advisors are compensated on a salary basis. We are incentivized to recommend that you add additional assets to your advisory account. Our financial advisors may be paid sales, service or administrative fees for the sale of mutual funds or other investment products. Our financial advisors may receive commission-based compensation for the sale of securities and insurance products. We do not receive non-cash compensation.

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

Yes, certain KFC professionals have disciplinary records, which can be found by accessing Investor.gov/CRS for a free and simple search tool to research our firm and our financial professionals.

Other Questions You May Have

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

You can find additional information about our investment advisory services on our Part 2A Brochure, available at Adviserinfo.sec.gov. You may contact us at 614-469-5003 or via email to admin@keidanfinancial.com if you have questions or to request a current copy of this Relationship Summary.

Other Questions You May Have

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 this person is treating me?