

MARCH 27, 2025: FORM CRS (CLIENT RELATIONSHIP SUMMARY)
A SUMMARY OF YOUR ADVISORY RELATIONSHIP WITH WEALTHTRUST ASSET MANAGEMENT, LLC

WealthTrust Asset Management, LLC dba TAMP Advisory Solutions is registered with the Securities and Exchange Commission (SEC) as an Investment Adviser. Brokerage and investment advisory services and fees differ, and it is essential for you to understand these differences. Free and simple tools are available to research firms and our Financial Professionals at Investor.gov/CRS, which also provides educational materials about broker-dealers, Investment Advisers, and investing.

ITEM 2 – RELATIONSHIPS AND SERVICES

WHAT INVESTMENT SERVICES AND ADVICE CAN YOU PROVIDE ME?

Investment Management: Our Firm offers investment advisory services to retail investors on a discretionary and non-discretionary basis. Our firm monitors your investment account and the underlying investments on an ongoing basis to ensure your asset allocation corresponds with your stated investment timeline and risk tolerance and this service is included as part of the Firm's standard advisory services. We also offer Retirement Planning and Financial Planning. Our Firm requires a minimum account value of \$50,000 in order to provide advisory services to you. This minimum account value requirement is negotiable.

QUESTIONS TO ASK YOUR FINANCIAL PROFESSIONAL:

- 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?

FOR MORE INFORMATION REFER TO OUR FIRM'S ADV PART 2A BROCHURE - ITEM 4, 7, 13 AND 16

ITEM 3 – FEES, COSTS, CONFLICTS, AND STANDARD OF CONDUCT

WHAT FEES WILL I PAY?

Our Firm receives a fee as compensation for providing investment services on your account. Depending upon the type of management of your account, the investment services fee may include investment management, supervision, trade entry, and other account maintenance and/or service activities. In addition to our investment services fee, the custodian will charge transaction costs, custodial fees, redemption fees, retirement plan, and administrative fees or commissions. Our Firm's advisory fees are billed as follows: Our investment management fees are based on a percentage of the total account value or a flat dollar amount. Our maximum annual investment advisory fee is 1.75%, billed in advance or arrears on a monthly or quarterly basis. For accounts billed based on assets under management, the more assets in your advisory account, the more you will pay in fees, and therefore, the Firm has an incentive to encourage you to increase the asset value in your account. Fees for financial planning services range from \$1,000-\$5,000 for the first year in which a financial plan is delivered. For Retirement Planning, we charge an annual percentage of assets in arrears. Under our Wrap Fee program, you will receive our investment services and the execution of securities brokerage transactions for a single specified investment services fee. Because wrap fee programs bundle service fees into a single fee, total fees to a client in a wrap fee program may be more or less than obtaining such services separately. 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.

QUESTIONS TO ASK YOUR FINANCIAL PROFESSIONAL:

- How do these fees and costs 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?

FOR MORE INFORMATION REFER TO OUR FIRM'S ADV PART 2A BROCHURE - ITEM 5

**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 interest 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. Such as, asset-based fees present a conflict because our Firm is incentivized by encouraging you to invest additional funds in your advisory accounts. The following are examples where asset-based fee compensation poses a conflict: 1) Advising to rollover a 401(k) balance, when equivalent and less costly

options are available if funds are left with the employer's fund manager. 2) Advising you to not pay off a mortgage (thus diminishing assets), even when the mortgage carries a high interest rate. 3) Advising against making a large charitable contribution to get a tax deduction (but decrease assets under management). Our firm allows our Financial Professionals to invest in the same securities as you; therefore, our Financial Professionals may have an incentive to favor their personal accounts over your advisory account. Some of our representatives are licensed to sell insurance and this is a conflict due to the incentive to recommend insurance to our clients. The Firm manages an exchange-traded fund, The WealthTrust DBS Long Term Growth ETF ("the Fund"), and may recommend it to clients, creating a potential conflict of interest as we have an incentive to favor the Fund over other investment options. To mitigate this conflict, we prioritize our clients' best interests and waive the Fund's expense fees for accounts under our management. .Lastly, some of the products, services and other benefits provided by your custodians are used in servicing all of our Firm's advisory accounts and, therefore may not directly benefit your advisory account.

QUESTIONS TO ASK YOUR FINANCIAL PROFESSIONAL:

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

FOR MORE INFORMATION REFER TO OUR FIRM'S ADV PART 2A BROCHURE - ITEM 5, 10, 11, AND 14

HOW DO YOUR FINANCIAL PROFESSIONALS MAKE MONEY?

Our Firm's Financial Professionals are compensated by the investment service fees as described above in Item 3 Fee section. Investment Services Fees are based on the amount of assets serviced, the complexity of the asset management, and/or investment services provided. Some of our Financial Professionals act as a Registered Representative of a broker-dealer and receive commissions in connection with the transactions made in client accounts at the broker-dealer. Some of our Financial Professionals are also insurance licensed and receive commissions, trails, or other compensation from the respective insurance companies as a result of effecting insurance transactions. Some of our Financial Professionals act as an Investment Adviser Representative of another independent Registered Investment Adviser ("RIA") where they receive advisory fees in connection with clients' accounts at the independent RIA. These outside business' commissions and fees are in addition to the Investment Services fee charged to you by our firm and because these commissions and fees derived may provide more compensation to the Financial Professional than what they would receive from an Investment Services Fee with our firm, a conflict of interest exists. Our Firm's Financial Professionals that are engaged in any of these outside business activities are required to disclose them to you and any conflict they may pose. You have the right to decide whether to act on any recommendation made by your Financial Professional. We recognize our duty to place your interests first and have established policies to mitigate conflicts of interest. In addition, all Financial Professionals are required to follow a Code of Conduct to mitigate any conflicts to you.

ITEM 4 – DISCIPLINARY HISTORY

DO YOU OR YOUR FINANCIAL REPRESENTATIVES HAVE DISCIPLINARY HISTORY?

Yes. Visit Investor.gov/CRS for a free and simple search tool to research us and our financial professionals.

QUESTIONS TO ASK YOUR FINANCIAL PROFESSIONAL:

- As a Financial Professional, do you have any disciplinary history? For what type of conduct?

PLEASE REFER TO OUR FIRM'S ADV PART 2A BROCHURE - ITEM 9

FOR ADDITIONAL INFORMATION ABOUT OUR SERVICES OR AN UP TO DATE COPY OF THIS CLIENT RELATIONSHIP SUMMARY, PLEASE CONTACT:

4458 LEGENDARY DRIVE #140 DESTIN, FL 32541 PH: 850-460-8444

WWW.WEALTHTRUSTAM.COM

QUESTIONS TO ASK YOUR FINANCIAL PROFESSIONAL:

- Who is my primary contact person? Is he or she an investment adviser or a representative of a broker-dealer? Who can I talk to if I have concerns about how this person is treating me?

MATERIAL CHANGES

The following material changes have occurred since March 27, 2025, our last update:

- The Firm has updated Item 4 to include services.
- The firm has updated Item 5 to include fees.
- The firm has updated Item 5 to include insurance and ETF conflicts.