DOMAIN MONEY ADVISORS, LLC: Client Relationship Summary – Form CRS – September 18th, 2026

Item 1 – Introduction

Domain Money Advisers, LLC, ("***Adviser***", "***our***" or "***we***") which is wholly-owned by Domain Money Inc. ("***Domain Money***"), is an SEC-registered investment advisory firm that provides financial planning and investment management services to advisory clients (each a "Client") which includes working with Clients in such areas as asset allocation, portfolio reviews, cash flow and budgeting, retirement planning, real estate analysis, risk management and estate planning, and other, related consulting services.

Brokerage and investment advisory services and fees differ, and it is important that you 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 – Relationships and Services

What investment services and advice can you provide me?

Financial Planning and Investment Consultation Services. The Adviser's investment advisory representatives are also Certified Financial Planners ("CFP®s") and provide Clients with financial planning, investment management, and/or consulting services by phone, chat or video chat ("Services"). These Services could include, without limitation: asset allocation advice, portfolio review, employment benefits planning, planning and investing for financial goals (including retirement planning, education planning, home buying, etc.), cash flow analysis, real estate analysis, risk management, tax strategies, estate planning, or other specific needs as Clients may request.

Investment consultation could result in providing information on the types of investment vehicles available, employee stock options, investment analysis and strategies and asset selection. Our CFP®s may also assist Clients in establishing their own investment account at Altruist, a custodian we have an established relationship with, or a selected broker/dealer or custodian of a Client's choosing.

For more information, please see Items 4 and 7 in Domain's Form ADV Part 2A ("***Brochure***"), which is available on the Domain Website and on the SEC's IARD database at www.adviserinfo.sec.gov.

Conversation Starters

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?

Item 3 – Fees, Costs, Conflicts, and Standard or Conduct

What fees will I pay?

We offer our Initial Engagements on a fixed fee basis and are then renewed on an annual basis as described below:

The Essentials Plan is billed at $3,900 for Year 1 and is renewed annually for $2,900.
The Strategic Plan is billed at $5,200 for Year 1 and is renewed annually for $4,200.
The Comprehensive Plan is billed at $9,000 for Year 1 and is renewed annually for $8,000.

Clients who require any additional assistance or further services outside the scope of the noted engagements may be billed separately and those services will be charged on an hourly basis or based on an agreed upon fixed fee. The firm's current hourly rate is $500, assessed in 15 minute increments, and a partial increment will be treated as a whole (i.e. 10 minutes will be billed for 15).

Domain Money charges 0% investment management fees. Should a client choose to open an account through Domain Money's partner custodian, Altruist, depending on the portfolio your CFP recommends, small third-party fees charged by Altruist may apply — for example, a 0.12% (12 bps) model portfolio fee and/or a 0.10% (10 bps) tax management fee. For most clients, Altruist One (a flat 0.12%) is the most cost-effective option as it waives both. Your CFP will walk you through the details. ETFs and mutual funds also carry standard industry expense ratios set by the fund provider.

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 more information regarding our fees*, see Item 5 in our Brochure.

Conversation Starters

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 have to act in your best interest and not put our interest ahead of yours. Because we only make money by providing advice, we do not have any inherent conflict of interest in the way we make money.

Here are some examples to help you understand what this means:

- We only make money by collecting a fixed fee for each engagement based on the specific subjects that clients want to tackle
- We recommend services that we've evaluated and believe are the best fit for each client, and we do not receive any compensation from service providers we recommend

For more information regarding our conflicts of interest, please see Item 11 in our Brochure.

Conversation Starters

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

How do your financial professionals make money?

The Adviser's financial professionals receive a standard base compensation and stock options in the Advisor's parent company, Domain Money, Inc. . Total compensation will consider factors at our discretion such as market rate for the role and expertise, overall revenue, new assets, retained assets, contributions to our culture, and business strength. Our financial professionals' compensation incentives, demand on their time, and personal investing activities may raise conflicts with your investment needs and the services we provide. Our financial professionals do not receive compensation for selling any products, or revenue Domain earns from the financial professional's advisory services or recommendations.

In addition to the Adviser's financial professionals, our salespersons receive a standard base compensation and a commission-based compensation that is fixed regardless of the level of the financial plans a client pays for.

Item 4 – Disciplinary History

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

Yes.

Domain Money settled a matter with the Securities Division of the Office of the Secretary of the Commonwealth of Massachusetts on August 22, 2022, involving late filing of a Notice filing and under which it agreed to be censured, pay a $5,000 fine and agree to certain additional conditions. Visit www.investor.gov/CRS for a free and simple search tool to research us further.

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

Conversation Starters

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

Item 5 – Additional Information

For more information about our investment advisory services, please see Domain's Brochure and visit our website at Domianmoney.com. You can also request additional, up-to-date information or a copy of this Client Relationship Summary by calling us at (646) 970-6926.

Conversation Starters

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?