

Good Deals Advisors, LLC

Form CRS — Client Relationship Summary

March 24, 2026

Good Deals Advisors, LLC is registered with the Texas State Securities Board as an investment adviser. Brokerage and investment advisory services and fees differ, and it is important for you to understand these 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.

What investment services and advice can you provide me?

We offer investment advisory services to individuals, business owners, families, trusts, estates, and small business retirement plans. Our services include wealth management (portfolio construction and ongoing oversight), financial planning, insurance and protection planning coordination, estate and legacy planning coordination, business consulting, and fractional CFO services.

For wealth management clients, we provide ongoing monitoring of your account(s) and conduct formal reviews at least quarterly. We may manage your account on a discretionary basis, meaning we can buy and sell investments in your account without asking you in advance, or on a non-discretionary basis where you make the final decision on each transaction. We do not impose a minimum account size.

We recommend that clients use Altruist Financial LLC as their custodian. We are not affiliated with Altruist.

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?

What fees will I pay?

Our principal fee for wealth management is an asset-based fee of up to 1.50% per year of the assets in your account, billed quarterly in advance. The more assets in your account, the more you will pay in fees, which gives us an incentive to encourage you to increase the assets in your account.

For standalone financial planning, we charge a fixed fee of \$1,000 or more depending on complexity. For fractional CFO and business advisory services, we charge hourly, monthly retainer, or project-based fees agreed upon in advance.

You will also pay fees to Altruist Financial LLC (our recommended custodian), which may include transaction fees for certain securities. If your account uses Altruist LLC's Model Marketplace or tax management tools, additional fees of 0.00% to 1.00% may apply. You will also pay the internal fees and expenses of any mutual funds or exchange-traded funds held in your account.

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.

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

- Our principal, Andrew Escher, is a licensed insurance agent and may earn commissions when insurance products are recommended and placed. When recommending insurance products in the capacity of an insurance agent, we are not acting as your fiduciary under the Investment Advisers Act.
- We participate in Altruist LLC's Model Marketplace and may benefit from operational efficiencies or features provided through our institutional relationship with Altruist.

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

How do your financial professionals make money?

Andrew Escher, our sole financial professional, is compensated through the Firm's advisory fee revenue and through insurance commissions earned from the placement of insurance products. His compensation is not based on the amount of client assets he services, the time and complexity of services provided, product sales, or revenue the Firm earns from third-party providers.

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

No. Visit investor.gov/CRS for a free and simple search tool to research us and our financial professionals.

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

Additional Information

For additional information about our services, see our Form ADV Part 2A brochure, available at adviserinfo.sec.gov or upon request. To request a copy of this relationship summary or our brochure, or to request up-to-date information, contact Andrew M. Escher, CFA at (816) 607-1217 or andrew@gooddeals.work.

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?