

IForm ADV Part 2A: Firm Brochure

Item 1 – Cover Page

**Premier Investment Services, LLC
Doing business as Hill and LaBarre Wealth Management**

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Williamstown, New Jersey 08094
856-562-8080

Date of Disclosure Brochure: April 2021
Last Annual Update: January 2026

This disclosure brochure provides information about the qualifications and business practices of Premier Investment Services, LLC doing business as Hill and LaBarre Wealth Management (also referred to as we, us, Premier Investment Services and HLWM throughout this disclosure brochure). If you have any questions about the contents of this disclosure brochure, please contact Donald T. Hill Jr. at 856-562-8080 or DHillJr@HLWealthTeam.com. The information in this disclosure brochure has been approved by New Jersey, Pennsylvania and Texas state securities authority.

Additional information about Premier Investment Services is also available on the Internet at www.adviserinfo.sec.gov. You can view our firm's information on this website by searching for Premier Investment Services, LLC or our firm's CRD number 314359.

*Registration as an investment adviser does not imply a certain level of skill or training.

Item 2 – Material Changes

Premier Investment Services LLC doing business as Hill and LaBarre Wealth Management. This brochure has been updated to reflect material changes to Hill and LaBarre Wealth Management's advisory services, fee schedule, and program structure.

Key updates include:

- **Service Structure Clarification:**
The firm has refined its advisory offerings to clearly distinguish between its Portfolio Management (model-based) services and its Strategic Portfolio Management services, including differences in scope, level of advisory involvement, and client engagement.
- **Scope of Services Update:**
The firm has expanded and clarified the scope of services provided under its Strategic Portfolio Management.
- **Fee Schedule Update:**
The firm has updated its advisory fee schedule, including revised asset-based fee tiers for Wealth Management services to improve consistency and alignment with services provided.
- **Options and Derivatives Disclosure:**
The firm has added disclosure regarding the potential use of options-based strategies, including covered call writing and cash-secured put selling, for certain clients where appropriate. Additional risk disclosures related to these strategies have also been included.

These changes are intended to provide greater transparency regarding the firm's services, fees, and investment approach.

Clients may request a copy of the firm's most current disclosure brochure at any time by contacting the firm.

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Item 4 – Advisory Business

Premier Investment Services doing business as Hill and LaBarre Wealth Management (HLWM) is an investment adviser that is registered in our home state of New Jersey and other states where required by regulation.

- Donald T. Hill Jr is the Managing Member of HLWM. Donald T. Hill Jr owns 47.00% of HLWM. Full details of the education and business background of Donald T. Hill Jr are provided at *Item 19* of this Disclosure Brochure.
- Kyle J. LaBarre is the Chief Compliance Officer (CCO) and Managing Member of HLWM. Kyle J. LaBarre owns 33.00% of HLWM. Full details of the education and business background of Kyle J. LaBarre are provided at *Item 19* of this Disclosure Brochure.
- Donald T Hill Sr. is a minority owner of the firm (20%) and is the firm's SAA and registered investment advisor.
- HLWM filed its initial application to become registered as an investment adviser in April 2021.

Clients of HLWM will be provided a copy of this firm's brochure at least 48 hours prior to signing an agreement. If this has not occurred, the client has five business days in which to cancel, without penalty. This protection is available for all services offered to HLWM clients.

Introduction

The investment advisory services of HLWM are provided to you through an appropriately licensed individual who is an investment adviser representative of HLWM (referred to as your investment adviser representative throughout this brochure).

Description of Advisory Services

The following are descriptions of the primary advisory services of HLWM. Please understand that a written agreement, which details the exact terms of the service, must be signed by you and HLWM before we can provide you the services described below.

Asset Management Services – HLWM provides ongoing investment management and advisory services for your designated accounts. A written agreement outlining the specific terms of service must be signed before services begin.

We offer two primary service approaches based on your needs:

Portfolio Management (Model-Based)

This approach utilizes structured, diversified portfolios aligned with your risk tolerance and investment objectives. Portfolios are monitored and rebalanced as needed, with a focus on long-term discipline and consistency rather than frequent trading activity.

Strategic Portfolio Management

This service provides discretionary investment management utilizing a structured portfolio approach consisting of a core allocation, typically implemented through model portfolios, supplemented by a satellite allocation tailored to the client's individual financial situation, investment objectives, and

preferences.

The core allocation is designed to provide diversification and long-term consistency, while the satellite portion allows for customization, including the incorporation of specific securities, strategies, or thematic exposures where appropriate.

HLWM provides ongoing portfolio monitoring, rebalancing, and adjustments based on market conditions, client objectives, and risk tolerance.

As part of this service, HLWM may provide **limited financial guidance incidental to portfolio management**, including general discussions related to investment strategy, savings, income considerations, and long-term financial objectives. Clients are offered at least one annual consultation to review their investment strategy and any relevant financial considerations related to the managed portfolio.

This service does not include comprehensive financial planning or advice regarding assets not managed by HLWM. Clients seeking broader financial planning services may engage HLWM under a separate agreement.

Under the Strategic Portfolio Management, client portfolios are generally constructed using a core investment strategy designed to provide diversification and consistency. In addition to this core allocation, HLWM may incorporate other securities or strategies, where appropriate, to better align the portfolio with the client's specific financial situation, objectives, and preferences. The allocation between core and additional investments may vary based on individual circumstances and is not fixed.

You must appoint HLWM as the investment adviser of record on your designated account(s) (the "Account"). All accounts are held with qualified custodians under your name. These custodians maintain physical custody of all funds and securities, while HLWM provides management and advisory services. You must appoint our firm as your investment adviser of record on specified accounts (collectively, the "Account"). The Account consists only of separate account(s) held by qualified custodian(s) under your name. The qualified custodians maintain physical custody of all funds and securities of the Account, and you retain all rights of ownership (e.g., right to withdraw securities or cash, exercise or delegate proxy voting and receive transaction confirmations) of the Account.

The Account is managed by us based on your financial situation, investment objectives and risk tolerance. We actively monitor the Account and provide advice regarding buying, selling, reinvesting or holding securities, cash or other investments of the Account.

We will need to obtain certain information from you to determine your financial situation and investment objectives. You will be responsible for notifying us of any updates regarding your financial situation, risk tolerance or investment objective and whether you wish to impose or modify existing investment restrictions; however we will contact you at least annually to discuss any changes or updates regarding your financial situation, risk tolerance or investment objectives. We are always reasonably available to consult with you relative to the status of your Account. You have the ability to impose reasonable restrictions on the management of your accounts, including the ability to instruct us not to purchase certain securities.

It is important that you understand that we manage investments for other clients and may give them

advice or take actions for them or for our personal accounts that are different from the advice we provide to you or actions taken for you. We are not obligated to buy, sell or recommend to you any security or other investment that we may buy, sell or recommend for any other clients or for our own accounts.

Conflicts may arise in the allocation of investment opportunities among accounts that we manage. We strive to allocate investment opportunities believed to be appropriate for your account(s) and other accounts advised by our firm among such accounts equitably and consistent with the best interests of all accounts involved. However, there can be no assurance that a particular investment opportunity that comes to our attention will be allocated in any particular manner. If we obtain material, non-public information about a security or its issuer that we may not lawfully use or disclose, we have absolutely no obligation to disclose the information to any client or use it for any client's benefit.

Financial Planning & Consulting Services - HLWM offers financial planning services, which involve preparing a written financial plan covering specific or multiple topics. We provide full written financial plans, which typically address the following topics: Investment Planning, Retirement Planning, Tax Planning, Education Planning, Portfolios Review, Asset Allocation, Risk management, and Budgeting and Cash Flow Analysis. When providing financial planning and consulting services, the role of your investment adviser representative is to find ways to help you understand your overall financial situation and help you set financial objectives. Written financial plans prepared by us do not include specific recommendations of individual securities.

We also offer consultations in order to discuss financial planning issues when you do not need a written financial plan. We offer a one-time consultation, which covers mutually agreed upon areas of concern related to investments or financial planning. We also offer "as-needed" consultations, which are limited to consultations in response to a particular investment or financial planning issue raised or request made by you. Under an "as-needed" consultation, it will be incumbent upon you to identify those particular issues for which you are seeking our advice or consultation on.

Our financial planning and consulting services do not involve implementing any transaction on your behalf or the active and ongoing monitoring or management of your investments or accounts. You have the sole responsibility for determining whether to implement our financial planning and consulting recommendations. To the extent that you would like to implement any of our investment recommendations through HLWM or retain HLWM to actively monitor and manage your investments, you must execute a separate written agreement with HLWM for our asset management services.

Retirement Plan Rollover Recommendations - To the extent we recommend you roll over your account from a current retirement plan to an individual retirement account ("Rollover IRA"), managed by HLWM please know that HLWM and our investment adviser representatives have a conflict of interest. We can earn increased investment advisory fees by recommending that you roll over your account at the retirement plan to a Rollover IRA managed by HLWM. We will earn fewer investment advisory fees if you do not roll over the funds in the retirement plan to a Rollover IRA managed by HLWM.

Thus, our investment adviser representatives have an economic incentive to recommend a rollover of funds from a retirement plan to a Rollover IRA which is a conflict of interest because our recommendation that you open an IRA account to be managed by our firm can be based on our economic incentive and not based exclusively on whether or not moving the IRA to our management program is in your overall best interest. We have taken steps to manage this conflict of interest. we have

adopted an impartial conduct standard whereby our investment adviser representatives will (i) provide investment advice to a retirement plan participant regarding a rollover of funds from the retirement plan in accordance with the fiduciary status described below, (ii) not recommend investments which result in HLWM receiving unreasonable compensation related to the rollover of funds from the retirement plan to a Rollover IRA, and (iii) fully disclose compensation received by HLWM and our supervised persons and any material conflicts of interest related to recommending the rollover of funds from the retirement plan to a Rollover IRA and refrain from making any materially misleading statements regarding such rollover.

Our investment advisor representatives shall act with the care, skill, prudence, and diligence under the circumstances then prevailing that a prudent person acting in a like capacity and familiar with such matters would use in the conduct of an enterprise of a like character and with like aims, based on the investment objectives, risk, tolerance, financial circumstances, and a client's needs, without regard to the financial or other interests of HLWM or our affiliated personnel.

Wealth Advisory Program (Subscription-Based) - The Wealth Advisory Program is a subscription-based service that provides clients with periodic financial planning and advisory support beyond the assets managed by HLWM. This service is designed for clients seeking broader financial guidance across their overall financial situation, including assets not directly managed by the Firm ("held-away assets").

Services may include, but are not limited to, retirement planning, cash flow and budgeting analysis, debt management strategies, employer-sponsored plan guidance, and general financial decision-making support. Advice is provided through scheduled consultations and client-initiated inquiries. Clients in this program are entitled to a defined number of consultations per year, with additional consultations available at the discretion of HLWM and may be subject to additional fees as agreed upon in advance.

This service does not include discretionary investment management, trade execution, or continuous monitoring of client accounts. Financial planning and consulting services are provided based on information supplied by the client, and clients are responsible for the implementation of any recommendations unless otherwise engaged under a separate agreement.

Educational Services - HLWM will provide educational classes through pre-recorded online classes designed to teach students from zero experience in trading up through trading derivatives. The classes are broken down into three separate tiers which the consumer can choose to utilize for their purposes. The first tier is comprised of 6 online lessons breaking down how the Stock Market works, fundamental analysis, technical analysis, shorting the stock market, and effective timing when placing a trade. The second tier is designed to educate the user on trading derivatives and places a heavy focus on the options market. The second tier will have 6 online lessons introducing the options market, breaking down the pricing of option contracts, trading call options, trading put options, cash covered puts, and covered calls. The last tier is designed to facilitate more advanced option trading. The last tier is comprised of 4 online lessons which will break down trading credit spreads, debit spreads, combination of spreads in various market conditions, and advance option strategies. These programs are educational in nature and do not constitute personalized investment advice.

Business Retirement Plan Consulting Services

We provide consulting services to business owners and plan sponsors regarding employer-sponsored retirement plans, including 401(k) plans.

These services may include:

- **Assistance with plan design and structure (e.g., Safe Harbor, profit sharing)**
- **Recommendations regarding plan providers, recordkeepers, and third-party administrators**
- **Investment lineup selection and monitoring**
- **Guidance regarding default investment options and asset allocation frameworks**
- **Ongoing plan review and coordination with other financial professionals**

ERISA Fiduciary Services

When providing retirement plan services, we may act as a fiduciary under ERISA in either a **non-discretionary (3(21)) or discretionary (3(38)) capacity**, depending on the specific agreement with the client.

3(21) — Non-Discretionary Advisory Services

In a non-discretionary capacity, we provide investment recommendations to the plan sponsor, who retains final decision-making authority regarding investment selections and plan-related decisions.

3(38) — Discretionary Investment Management

In certain circumstances, and where agreed upon in writing, we may act as an ERISA Section 3(38) investment manager. In this capacity, we are granted discretionary authority to select, monitor, and replace investment options within the plan without prior approval from the plan sponsor.

When acting as a 3(38) investment manager, we assume fiduciary responsibility for the selection and monitoring of plan investments, subject to the terms outlined in the applicable client agreement.

Platform / Provider Disclosure

We may work with third-party service providers, including recordkeepers and plan administrators, to facilitate plan implementation and administration. These providers are responsible for operational, administrative, and compliance functions of the plan.

Investment Limitations

Investment options available within retirement plans are generally limited to those made available by the plan provider or recordkeeper. As such, our ability to implement investment strategies may be subject to platform constraints.

We generally focus on fund selection, asset allocation, and overall investment structure rather than individual security selection within participant accounts.

Important Clarification

Not all retirement plan engagements will include discretionary (3(38)) services. The scope of services and fiduciary role will be clearly defined in the client agreement.

Limits Advice to Certain Types of Investments

HLWM provides investment advice on the following types of investments:

- Mutual Funds
- Exchange Traded Funds (ETFs)
- Exchange-listed Securities
- Corporate Debt Securities
- Municipal Securities
- US Government Securities
- Options Contracts on Securities
- Options Contracts on Commodities

Although we generally provide advice only on the products previously listed, we reserve the right to offer advice on any investment product that may be suitable for each client's specific circumstances, needs, goals and objectives.

It is not our typical investment strategy to attempt to time the market, but we may increase cash holdings modestly as deemed appropriate based on your risk tolerance and our expectations of market behavior. We may modify our investment strategy to accommodate special situations such as low basis stock, stock options, legacy holdings, inheritances, closely held businesses, collectibles, or special tax situations.

(Please refer to Item 8 – Methods of Analysis, Investment Strategies and Risk of Loss for more information.)

Tailor Advisory Services to Individual Needs of Clients

HLWM's advisory services are always provided based on your individual needs. This means, for example, that when we provide asset management services, you are given the ability to impose restrictions on the accounts we manage for you, including specific investment selections and sectors. We work with you on a one-on-one basis through interviews and questionnaires to determine your investment objectives and suitability information. Our financial planning and consulting services are always provided based on your individual needs. When providing financial planning and consulting services, we work with you on a one-on-one basis through interviews and questionnaires to determine your investment objectives and suitability information.

We will not enter into an investment adviser relationship with a prospective client whose investment objectives may be considered incompatible with our investment philosophy or strategies or where the prospective client seeks to impose unduly restrictive investment guidelines.

Client Assets Managed by HLWM

As a newly registered investment adviser, Premier Investment Services has \$252,894 Assets Under Management.

Item 5 – Fees and Compensation

In addition to the information provided in *Item 4 – Advisory Business*, this section provides additional details regarding our firm's services along with descriptions of each service's fees and compensation arrangements. It should be noted that lower fees for comparable service may be available from other sources. The exact fees and other terms will be outlined in the agreement between you and Premier Investment Services.

Asset Management Services

Fees charged for our asset management services are charged based on a percentage of assets under management, billed in arrears (at the end of the billing period) on a quarterly calendar basis and calculated based on the fair market value of your account as of the last business day of the current billing period. Fees are prorated (based on the number of days service is provided during the initial billing period) for your account opened at any time other than the beginning of the billing period. If asset management services are commenced in the middle of the billing period, then the prorated fee for that billing period will be billed in arrears at the end of that billing period.

The asset management services continue in effect until terminated by either party (i.e., HLWM or you) by providing written notice of termination to the other party. When fees are billed in arrears, HLWM will prorate the final fee payment based on the number of days services are provided during the final period. The amount of client assets on the termination date will be used to determine the final fee payment.

Fees charged for our asset management services are negotiable based on the total amount of assets under management for the client.

For our asset management services, client will be charged the following annual fee based upon the amount of assets under management:

Portfolio Management (Model Program):

Under the Portfolio Management Program, HLWM provides professionally managed investment portfolios designed to align with your risk tolerance, time horizon, and overall investment objectives. Portfolios are constructed using a model-based approach and are monitored on an ongoing basis, with periodic rebalancing to maintain appropriate asset allocation. This service includes general investment guidance, such as recommendations related to contribution strategies, account types, and long-term investing principles. Clients have access to an advisor for general investment-related questions; however, this program does not include comprehensive financial planning, ongoing cash flow or budgeting analysis, tax planning or coordination, business or income strategy, detailed retirement projections, or proactive advisory outreach. The focus of this program is to provide disciplined investment management with limited advisory scope.

Assets Under Management Annual Fees

No Account Minimum 0.75%

Strategic Portfolio Management:

Under Strategic Portfolio Management, HLWM provides discretionary investment management with a higher level of portfolio customization through a core and satellite approach. The service includes ongoing monitoring, rebalancing, and adjustments based on client objectives and market conditions. HLWM may

provide limited financial guidance incidental to portfolio management; however, this service does not include comprehensive financial planning or advice regarding assets not managed by HLWM.

For certain clients, and where deemed appropriate based on financial situation, investment objectives, and risk tolerance, HLWM may implement options-based strategies within client portfolios. These strategies may include, but are not limited to, covered call writing and cash-secured put selling, with the objective of enhancing portfolio income and/or managing risk.

The use of options involves additional risks and may not be suitable for all clients. Such risks include, but are not limited to, potential obligation to buy or sell securities at unfavorable prices, limited upside participation, and increased portfolio complexity. All options activity will be conducted in accordance with the client's investment profile and with appropriate authorization.

Assets Under Management Annual Fees

| Assets Under Management | Fee |
|--------------------------------|------------|
| \$25,000 - \$50,000 | 1.50% |
| \$50,000 - \$100,000 | 1.25% |
| \$100,000 - \$500,000 | 1.00% |
| \$500,000 - \$1 million | 0.90% |
| \$1 million+ | Negotiable |

(This is **not** a “blended” annual fee schedule in which each tier of assets is charged a different rate under the annual fee schedule creating the effect of a blended fee rate used at the time of billing. Under our fee schedule described above, only one rate is charged against all of the client’s assets under management in this program.)

The minimum account size for the Strategic Portfolio Management is \$25,000.

HLWM believes that its annual fee is reasonable in relation to: (1) services provided and (2) the fees charged by other investment advisers offering similar services/programs. However, our annual investment advisory fee may be higher than that charged by other investment advisers offering similar services/programs. In addition to our compensation, you may also incur charges imposed at the mutual fund level (e.g., advisory fees and other fund expenses).

You can choose how to pay your investment advisory fees. The investment advisory fees can be deducted from your account and paid directly to our firm by the qualified custodian(s) of your account or you can pay our firm upon receipt of a billing notice sent directly to you.

If you choose to have the investment advisory fees deducted from your account, you must authorize the qualified custodian(s) of your account to deduct fees from your account and pay such fees directly to HLWM. Our firm will send you a billing statement prior to the time that fee deduction instruction is sent to the qualified custodian(s) of your account. The billing statement will detail the formula used to calculate the fee, the assets under management and the time period covered.

You should review your account statements received from the qualified custodian(s) and verify that appropriate investment advisory fees are being deducted. The qualified custodian(s) will not verify the accuracy of the investment advisory fees deducted.

If you choose to pay the fees after receiving a statement, fees are due upon your receipt of a billing

notice sent directly to you. The billing notice will detail the formula used to calculate the fee, the assets under management and the time period covered. Fees for the services of our firm will be due immediately after your receipt of the billing notice.

Brokerage expenses and/or transaction fees charged by the qualified custodian are billed directly to you by the qualified custodian. HLWM does not receive any portion of such commissions or fees from you or the qualified custodian. In addition, you will incur certain charges imposed by third parties other than HLWM in connection with investments made through your account including, but not limited to, mutual fund sales loads, 12(b)-1 fees and surrender charges, variable annuity fees and surrender charges, IRA and qualified retirement plan fees, and charges imposed by the qualified custodian(s) of your account. Management fees charged by HLWM are separate and distinct from the fees and expenses charged by investment company securities that may be recommended to you. A description of these fees and expenses are available in each investment company security's prospectus.

Business Retirement Plan Advisory Fees:

For establishing a defined contribution plan, there is a one time setup fee of up to \$1,000 for establishing a plan plus the 3(21) Advisory Services or 3(38) Discretionary Services AUM fee.

3(21) Advisory Services

For non-discretionary advisory services, we generally charge an asset-based fee of up to **0.25% annually** of plan assets.

3(38) Discretionary Services

For discretionary investment management services, we generally charge an asset-based fee of up to **0.40% annually** of plan assets.

Where Client maintains an ongoing asset-based advisory relationship with Advisor, certain business advisory and financial consulting services may be provided as part of that relationship and may not be billed separately. The scope of such services will be determined based on the nature of the engagement and Advisor's discretion.

Billing

Fees may be billed directly to the plan or participant accounts, depending on the platform and client arrangement.

Business Financial Advisory Fees:

HLWM will offer a 3 Tiered system for Financial Advisory Fees. This plan is separate from overseeing and managing a business's 401k retirement plan.

Foundational Advisory - \$100 / Month

Simple businesses that want occasional guidance but are mostly self-directed. Includes:

- General financial guidance (as needed)
- Basic cash flow / savings direction
- Annual financial check-in
- Email access for questions

Ongoing Advisory - \$250 / Month

Intended for growing businesses that want regular input and decision-making support. Includes:

- Ongoing financial guidance
- Cash flow and savings strategies
- Owner income / compensation discussions
- Quarterly check-ins
- Access for financial decisions as they arise

High-Touch Advisory - \$500 / Month

For businesses that want HLWM to be actively involved in financial strategy including:

- Everything in Ongoing Advisory
- Active involvement in financial decisions
- Cash flow planning and adjustments
- Strategy discussions (growth, reinvestment, etc.)
- Our firm actively oversees operations and makes suggestions on changes
- More frequent touchpoints as needed

Financial Planning & Consulting Services

Fees charged for our financial planning and consulting services are negotiable based upon the type of client, the services requested, the complexity of the client's situation, the composition of the client's account, other advisory services provided and the relationship of the client and the investment adviser representative. The following are the fee arrangements available for financial planning and consulting services offered by HLWM.

Fees for Financial Planning Services

Premier Investment Services provides financial planning services under an hourly fee arrangement. An hourly fee of up to \$250 per hour is charged by Premier Investment Services for financial planning services under this arrangement. **The hourly fee to be charged for our financial planning services will be specified in your Client Agreement.** Before commencing financial planning services, Premier Investment Services provides an estimate of the approximate hours needed to complete the requested financial planning services. If Premier Investment Services anticipates exceeding the estimated amount of hours required, Premier Investment Services will contact you to receive authorization to provide additional services. A 50% retainer fee is due at the time the client decides to use HLWealth's Financial Planning Services and the remaining 50% is due after services are completed.

The financial planning services terminate upon delivery of the written financial plan or upon either party providing the other party with written notice of termination.

You may terminate the financial planning services within five (5) business days of entering into an agreement with Premier Investment Services without penalty or fees due. If you terminate the financial planning services after five (5) business days of entering into an agreement, you will be responsible for immediate payment of any financial planning services performed by Premier Investment Services prior to the receipt by Premier Investment Services of your notice. For financial planning services performed by Premier Investment Services under an hourly arrangement, you will pay Premier Investment Services for any hourly fees incurred at the rates described above. In the event that there is a remaining

balance of any fees paid in advance after the deduction of fees from the final invoice, those remaining proceeds will be refunded by Premier Investment Services to you.

Fees for Consulting Services

Premier Investment Services provides consulting services under an hourly fee arrangement. An hourly fee of \$250 per hour is charged by Premier Investment Services for consulting services. **The hourly fee to be charged for our consulting services will be specified in your Client Agreement.** Before providing consulting service, Premier Investment Services will provide an estimate of the approximate hours needed to complete the consulting services. If Premier Investment Services anticipates exceeding the estimated amount of hours required, Premier Investment Services will contact you to receive authorization to provide additional services. A 50% retainer fee is due at the time the client decides to use HLWealth's Financial Planning Services and the remaining 50% is due after services are completed. Client agrees to notify Premier Investment Services within ten (10) days of receipt of an invoice if Client disputes any billing entry.

The one-time consulting services will terminate upon completion of the consultation or either party providing the other party with written notice. The "as-needed" consulting services will terminate upon either you or Premier Investment Services providing written notice of termination to the other party.

You may terminate the consulting services within five (5) business days of entering into an agreement with Premier Investment Services without penalty or fees due. If you terminate the consulting services after five (5) business days of entering into an agreement with Premier Investment Services, you will be responsible for immediate payment of any consulting work performed by Premier Investment Services prior to the receipt by Premier Investment Services of your notice. For consulting services performed by Premier Investment Services under an hourly arrangement, you will pay Premier Investment Services for any hourly fees incurred at the rates described above. In the event that there is a remaining balance of any fees paid in advance after the deduction of fees from the final invoice, those remaining proceeds will be refunded by Premier Investment Services to you.

Other Fee Terms for Financial Planning & Consulting Services

You may pay the investment advisory fees owed for the financial planning services by submitting payment directly (for example, by check) or having the fee deducted from an existing investment account.

If you elect to pay by automatic deduction from an existing investment account, you will provide written authorization to HLWM for such charge.

You should notify HLWM within ten (10) days of receipt of an invoice if you have questions about or dispute any billing entry.

To the extent HLWM engages an outside professional (i.e. attorney, independent investment adviser or accountant) while providing financial planning and consulting services to you, HLWM will be responsible for the payment of the fees for the services of such an outside professional, and you will not be required to reimburse HLWM for such payments. To the extent that you personally engage such an outside

professional, you will be responsible for the payment of the fees for the services of such an outside professional, and HLWM will not be required to reimburse Client for such payments. Fees for the services of an outside professional (i.e. attorney, independent investment adviser or accountant) will be in addition to and separate from the fees charged by HLWM, and you will be responsible for the payment of the fees for the services of such an outside professional. In no event will the services of an outside professional be engaged without your express approval.

All fees paid to HLWM for financial planning and consulting services are separate and distinct from the commissions charged by a broker-dealer or asset management fees charged by an investment adviser to implement such recommendations.

It should be noted that lower fees for comparable services may be available from other sources.

Wealth Advisory Program Fees

Clients participating in the Wealth Advisory Program are charged a flat subscription fee of \$199 per month, billed in advance on a recurring basis. This fee is separate from and in addition to any asset-based investment advisory fees. Clients may terminate the subscription at any time upon written notice, and fees will be prorated as applicable.

Fees are not based on assets under management and are not tied to investment performance.

Educational Services

As explained in Item 4 – Advisory Business HLWM offers 3 levels of financial education programs for clients. The fees for these programs are:

Tier 1 classes: \$300

Tier 2 classes: \$300

Tier 3 classes: \$300

You may pay for our Educational Programs by submitting payment directly (for example, by check) or credit or debit card.

If you elect to pay by credit or debit card, you will provide written authorization to HLWM for such a charge. Credit/Debit Card charges will be processed by an unaffiliated service provider. HLWM will not have direct access to the clients credit or debit card information.

Item 6 – Performance-Based Fees and Side-By-Side Management

Performance-based fees are defined as fees based on a share of capital gains on or capital appreciation of the assets held in a client's account. *Item 6* is not applicable to this Disclosure Brochure because we do not charge or accept performance-based fees.

Item 7 – Types of Clients

HLWM generally provides investment advice to the following types of clients:

- Individuals
- High net worth individuals
- Corporations or business entities other than those listed above
- Other Investment Advisors

You are required to execute a written agreement with HLWM specifying the particular advisory services in order to establish a client arrangement with HLWM.

Minimum Investment Amounts Required

HLWM requires a minimum of \$25,000 to open a Strategic Portfolio Management account and no minimum to open an account in our Portfolio Management (Model-Based) account. To reach this account minimum, clients can aggregate all household accounts.

The minimum fee generally charged for financial planning services provided on an hourly basis is \$250. The minimum hourly fee generally charged for consulting services is \$250.

Item 8 – Methods of Analysis, Investment Strategies and Risk of Loss

Methods of Analysis

Premier Investment Services uses the following methods of analysis in formulating investment advice:

Charting - This is a set of techniques used in technical analysis in which charts are used to plot price movements, volume, settlement prices, open interest, and other indicators, in order to anticipate future price movements. Users of these techniques, called chartists, believe that past trends in these indicators can be used to extrapolate future trends.

Charting is likely the most subjective analysis of all investment methods since it relies on proper interpretation of chart patterns. The risk of reliance upon chart patterns is that the next day's data can always negate the conclusions reached from prior days' patterns. Also, reliance upon chart patterns bears the risk of a certain pattern being negated by a larger, more encompassing pattern that has not shown itself yet.

Fundamental – This is a method of evaluating a security by attempting to measure its intrinsic value by examining related economic, financial and other qualitative and quantitative factors. Fundamental analysts attempt to study everything that can affect the security's value, including macroeconomic factors (like the overall economy and industry conditions) and individually specific factors (like the financial condition and management of a company). The end goal of performing fundamental analysis is to produce a value that an investor can compare with the

security's current price in hopes of figuring out what sort of position to take with that security (underpriced = buy, overpriced = sell or short). Fundamental analysis is considered to be the opposite of technical analysis. Fundamental analysis is about using real data to evaluate a security's value. Although most analysts use fundamental analysis to value stocks, this method of valuation can be used for just about any type of security.

The risk associated with fundamental analysis is that it is somewhat subjective. While a quantitative approach is possible, fundamental analysis usually entails a qualitative assessment of how market forces interact with one another in their impact on the investment in question. It is possible for those market forces to point in different directions, thus necessitating an interpretation of which forces will be dominant. This interpretation may be wrong, and could therefore lead to an unfavorable investment decision.

Technical – This is a method of evaluating securities by analyzing statistics generated by market activity, such as past prices and volume. Technical analysts do not attempt to measure a security's intrinsic value, but instead use charts and other tools to identify patterns that can suggest future activity. Technical analysts believe that the historical performance of stocks and markets are indications of future performance.

Technical analysis is even more subjective than fundamental analysis in that it relies on proper interpretation of a given security's price and trading volume data. A decision might be made based on a historical move in a certain direction that was accompanied by heavy volume; however, that heavy volume may only be heavy relative to past volume for the security in question, but not compared to the future trading volume. Therefore, there is the risk of a trading decision being made incorrectly since future trading volume is an unknown. Technical analysis is also done through observation of various market sentiment readings, many of which are quantitative. Market sentiment gauges the relative degree of bullishness and bearishness in a given security, and a contrarian investor utilizes such sentiment advantageously. When most traders are bullish, then there are very few traders left in a position to buy the security in question, so it becomes advantageous to sell it ahead of the crowd. When most traders are bearish, then there are very few traders left in a position to sell the security in question, so it becomes advantageous to buy it ahead of the crowd. The risk in utilization of such sentiment technical measures is that a very bullish reading can always become more bullish, resulting in lost opportunity if the money manager chooses to act upon the bullish signal by selling out of a position. The reverse is also true in that a bearish reading of sentiment can always become more bearish, which may result in a premature purchase of a security.

In evaluating investment options for retirement plans, we utilize a long-term, diversified investment approach focused on cost efficiency, asset allocation, and alignment with participant needs.

When acting in a discretionary capacity (3(38)), we select and monitor investment options based on this framework and may make changes to the investment lineup as deemed appropriate.

We generally recommend diversified investment vehicles such as mutual funds and exchange-traded funds (ETFs) and evaluate investments based on factors such as expense ratios, performance consistency, and role within a broader portfolio structure.

While we consider tax implications as part of our advisory services, we do not provide tax or legal advice. Clients are encouraged to consult with their CPA or attorney regarding their specific circumstances.

There are risks involved in using any analysis method.

Investment Strategies

Premier Investment Services uses the following investment strategies when managing client assets and/or providing investment advice:

Long term purchases. Investments held at least a year.

Short term purchases. Investments sold within a year.

Frequent trading. This strategy refers to the practice of selling investments within 30 days of purchase.

We primarily follow a value-investing strategy that attempts to acquire at reasonable valuations publicly traded businesses that can deliver sustainable excess returns. We focus on a long-only strategy. Long term strategies are designed to identify and select investments to be held for multiple years. We will also invest in value oriented special situations with shorter expected holding periods.

Value Investing can be described as a strategy of selecting stocks that trade for less than their intrinsic values. Value investors typically seek stocks of companies that they believe the market has undervalued. They believe the market overreacts to good and bad news, resulting in stock

price movements that do not correspond with the company's long-term fundamentals. The result is an opportunity for value investors to profit by buying when the price is deflated. Often, value investors select stocks with lower-than-average price-to-book or price-to-earnings ratios and/or high dividend yields. The risks associated with value-investing include incorrectly analyzing and overestimating the intrinsic value of a business, concentration risk, under performance relative to major benchmarks, macro-economic risks, investing in value traps i.e. businesses that remain perpetually undervalued, and lost purchasing power on cash holdings in the case of inflation.

Option writing including cover options, uncovered options or spreading strategies. Options are contracts giving the purchaser the right to buy or sell a security, such as stocks, at a fixed price within a specific period of time.

Tactical asset allocation. Allows for a range of percentages in each asset class (such as Stocks = 40-50%). The ranges establish minimum and maximum acceptable percentages that permit the investor to take advantage of market conditions within these parameters. Thus, a minor form of market timing is possible, since the investor can move to the higher end of the range when stocks are expected to do better and to the lower end when the economic outlook is bleak.

Strategic asset allocation. Calls for setting target allocations and then periodically rebalancing the portfolio back to those targets as investment returns skew the original asset allocation percentages. The concept is akin to a “buy and hold” strategy, rather than an active trading approach. Of course, the strategic asset allocation targets may change over time as the client’s goals and needs change and as the time horizon for major events such as retirement and college funding grow shorter.

Primarily Recommend One Type of Security

We do not primarily recommend one type of security to clients. Instead, we recommend any product that may be suitable for each client relative to that client’s specific circumstances and needs.

Risk of Loss

Past performance is not indicative of future results. Therefore, you should never assume that future performance of any specific investment or investment strategy will be profitable. Investing in securities (including stocks, mutual funds, and bonds, etc.) involves risk of loss. Further, depending on the different types of investments there may be varying degrees of risk. You should be prepared to bear investment loss including loss of original principal.

Because of the inherent risk of loss associated with investing, our firm is unable to represent, guarantee, or even imply that our services and methods of analysis can or will predict future results, successfully identify market tops or bottoms, or insulate you from losses due to market corrections or declines. There are certain additional risks associated with investing in securities through our investment management program, as described below:

- Market Risk – Either the stock market as a whole, or the value of an individual company, goes down resulting in a decrease in the value of client investments. This is also referred to as systemic risk.
- Equity (stock) market risk – Common stocks are susceptible to general stock market fluctuations and to volatile increases and decreases in value as market confidence in and perceptions of their issuers change. If you held common stock, or common stock equivalents, of any given issuer, you would generally be exposed to greater risk than if you held preferred stocks and debt obligations of the issuer.
- Company Risk. When investing in stock positions, there is always a certain level of company or industry specific risk that is inherent in each investment. This is also referred to as unsystematic risk and can be reduced through appropriate diversification. There is the risk that the company will perform poorly or have its value reduced based on factors specific to the company or its industry. For example, if a company’s employees go on strike or the company receives unfavorable media attention for its actions, the value of the company may be reduced.
- Fixed Income Risk. When investing in bonds, there is the risk that the issuer will default on the bond and be unable to make payments. Further, individuals who depend on set amounts of periodically paid income face the risk that inflation will erode their spending power. Fixed-income investors receive set, regular payments that face the same inflation risk.

- **Options Risk.** Options on securities may be subject to greater fluctuations in value than an investment in the underlying securities. Purchasing and writing put and call options are highly specialized activities and entail greater than ordinary investment risks.
- **ETF and Mutual Fund Risk** – When investing in an ETF or mutual fund, you will bear additional expenses based on your pro rata share of the ETF's or mutual fund's operating expenses, including the potential duplication of management fees. The risk of owning an ETF or mutual fund generally reflects the risks of owning the underlying securities the ETF or mutual fund holds. You will also incur brokerage costs when purchasing ETFs.
- **Management Risk** – Your investment with our firm varies with the success and failure of our investment strategies, research, analysis and determination of portfolio securities. If our investment strategies do not produce the expected returns, the value of the investment will decrease.

Item 9 – Disciplinary Information

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of our business or integrity.

Item 10 – Other Financial Industry Activities and Affiliations

HLWM is **not** and does **not** have a related person that is a broker/dealer, municipal securities dealer, government securities dealer or broker, an investment company or other pooled investment vehicle (including a mutual fund, closed-end investment company, unit investment trust, private investment company or "hedge fund," and offshore fund), another investment adviser or financial planner, a futures commission merchant, commodity pool operator, or commodity trading advisor, a banking or thrift institution, an accountant or accounting firm, a lawyer or law firm, an insurance company or agency, a pension consultant, a real estate broker or dealer, and a sponsor or syndicator of limited partnerships.

We are an independent registered investment adviser and only provide investment advisory services. We are not engaged in any other business activities and offer no other services except those described in this Disclosure Brochure.

Other Business Activities of Company Principal

Kyle J. LaBarre is a current member of the United States Air Force, he spends approximately 70% of his time on this activity. He is a silent partner of Villa Texas Insurance Services.

Item 11 – Code of Ethics, Participation in Client Transactions and Personal Trading Code of Ethics Summary

An investment adviser is considered a fiduciary and has a fiduciary duty to all clients. HLWM has established a Code of Ethics to comply with the requirements of the securities laws and regulations that reflects its fiduciary obligations and those of its supervised persons. The Code of Ethics also

requires compliance with federal securities laws. HLWM's Code of Ethics covers all individuals that are classified as "supervised persons". All employees, officers, directors and investment adviser representatives are classified as supervised persons. HLWM requires its supervised persons to consistently act in your best interest in all advisory activities. HLWM imposes certain requirements on its affiliates and supervised persons to ensure that they meet the firm's fiduciary responsibilities to you. The standard of conduct required is higher than ordinarily required and encountered in commercial business.

This section is intended to provide a summary description of the Code of Ethics of HLWM. If you wish to review the Code of Ethics in its entirety, you should send us a written request and upon receipt of your request, we will promptly provide a copy of the Code of Ethics to you.

Affiliate and Employee Personal Securities Transactions Disclosure

HLWM or supervised persons of the firm buy and sell for their personal accounts, investment products identical to those recommended to clients. This creates a conflict of interest. It is the express policy of HLWM that all persons associated in any manner with our firm must place clients' interests ahead of their own when implementing personal investments.

We are now and will continue to be in compliance with applicable state and federal rules and regulations. To mitigate conflicts of interest that can occur when access persons manage their personal accounts at the same time HLWM manages client accounts, we have developed written supervisory procedures that include personal investment and trading policies for our representatives, employees and their immediate family members (collectively, supervised persons):

- Supervised persons cannot prefer their own interests to that of the client.
- Supervised persons cannot purchase or sell any security for their personal accounts in such a way that front runs or gives disadvantages trading for clients.
- Supervised persons are prohibited from purchasing or selling securities of companies in which any client is deemed an "insider".
- Supervised persons are discouraged from conducting frequent personal trading. ● Supervised persons are generally prohibited from serving as board members of publicly traded companies unless an exception has been granted to the Chief Compliance Officer of HLWM.

Any Supervised person not observing our policies is subject to sanctions up to and including termination.

Item 12 – Brokerage Practices

We are responsible to ensure that the client receives the best execution possible. Best execution does not necessarily mean that clients receive the lowest possible commission costs but that the qualitative execution is best. In other words, all conditions considered, the transaction execution is in your best interest. When considering best execution, we look at a number of factors besides prices and rates including, but not limited to:

- Execution capabilities (e.g., market expertise, ease/reliability/timeliness of execution, responsiveness, integration with our existing systems, ease of monitoring investments) ● Products and services offered (e.g., investment programs, back office services, technology,

regulatory compliance assistance, research and analytic services)

- Financial strength, stability and responsibility
- Reputation and integrity
- Ability to maintain confidentiality

We exercise reasonable due diligence to make certain that best execution is obtained for all clients when implementing any transaction by considering the back office services, technology and pricing of services offered.

Brokerage Recommendations

HLWM requires that clients establish brokerage accounts with the Interactive Brokers (“IB”), a FINRA registered broker-dealer, Member SIPC, to maintain custody of clients’ assets and to effect trades for their accounts. HLWM is independently owned and operated and not affiliated with IB. HLWM may recommend additional unaffiliated broker-dealers to affect fixed income transactions.

IB provides HLWM with access to its institutional trading and custody services, which are typically not available to IB retail investors. These services generally are available to independent investment advisors on an unsolicited basis, at no charge to them so long as a total of at least \$10 million of the advisor’s clients’ assets are maintained at IB. These services are not contingent upon HLWM committing to IB any specific amount of business (assets in custody or trading commissions). IB’s brokerage services include the execution of securities transactions, custody, research, and access to mutual funds and other investments that are otherwise generally available only to institutional investors or would require significantly higher minimum initial investment.

IB also makes available to HLWM other products and services that benefit HLWM but may not directly benefit clients’ accounts. Many of these products and services may be used to service all or some substantial number of HLWM’ accounts, including accounts not maintained at IB.

IB’s products and services that assist HLWM in managing and administering clients’ accounts include software and other technology that (i) provides access to client account data (such as trade confirmations and account statements); (ii) facilitate trade execution and allocate aggregated trade orders for multiple client accounts; (iii) provide research, pricing and other market data; (iv) facilitate payment of HLWM’ fees from some of its accounts; and (v) assist with back-office functions, recordkeeping and client reporting.

IB also offers other services intended to help HLWM manage and further develop its business enterprise. These services may include: (i) compliance, legal and business consulting; (ii) publications and conferences on practice management and business succession; and (iii) access to employee benefits providers, human capital consultants and insurance providers. IB may discount or waive fees it would otherwise charge for some of these services or pay all or part of the fees of a third-party providing these services to HLWM. IB may also provide other benefits such as educational events or occasional business entertainment of HLWM personnel. While as a fiduciary, HLWM endeavors to act in its clients’ best interests, HLWM’ recommendation that clients maintain their assets in accounts at IB may take into account availability of some of the foregoing products and services and other arrangements not solely on the nature or quality of custody and brokerage services provided by IB, which may create a conflict of interest.

Directed Brokerage

HLWM does not direct brokerage away from the required custodian and nor does it permit clients to do so.

Soft Dollar Benefits

The benefits described in the "Brokerage Recommendations" section above are known as "soft dollar benefits", please see that section for more information regarding this topic.

Block Trading Policy

Investment advisors may elect to purchase or sell the same securities for several clients at approximately the same time when they believe such action may prove advantageous to clients. This process is referred to as aggregating orders, batch trading or block trading. HLWM engages in block trading.

It should be noted that implementing trades on a block or aggregate basis may be less expensive for client accounts; however, our trading policy is to implement all client orders on an individual basis. Therefore, we do not solely aggregate or "block" trade client transactions. Considering the types of investments we hold in advisory client accounts; we do not believe clients are hindered in any way because we trade accounts individually. This is because we develop individualized investment strategies for clients and holdings will vary. Our strategies are primarily developed for the long-term and minor differences in price execution are not material to our overall investment strategy.

Item 13 – Review of Accounts

Account Reviews and Reviewers

Managed accounts are reviewed at least annually. The process includes ensuring the investment strategies implemented match the client's objectives and this is conducted by the investment advisor representative.

Our financial planning services terminate upon the presentation of the written plan. Our financial planning and consulting services do not include monitoring the investments of your account(s), and therefore, there is no ongoing review of your account(s) under such services.

Statements and Reports

For our asset management services, you are provided with transaction confirmation notices and regular quarterly account statements in writing directly from the qualified custodian. Additionally, HLWM will provide position or performance reports to you quarterly and upon request.

Financial planning clients do not receive any report other than the written plan originally contracted for and provided by HLWM.

You are encouraged to always compare any reports or invoices provided by us against the account invoices delivered from the qualified custodian. When you have questions about your account invoice or report, you should contact our firm.

Item 14 – Client Referrals and Other Compensation

HLWM does not directly or indirectly compensate any person for client referrals.

We receive an economic benefit from IB in the form of the support products and services it makes available to us and other independent investment advisers whose clients maintain their accounts at IB. These products and services, how they benefit us, and the related conflicts of interest are described above (see *Item 12 – Brokerage Practices*). The availability of IB's products and services is not based on us giving particular investment advice, such as buying particular securities for our clients.

Other than these soft dollar benefits immediately described above and in item 12, we do not receive any compensation from any 3rd party for the advisory services we provide to clients.

Please see Item 5, Fees and Compensation, Item 10, Other Financial Industry Activities and Affiliations and Item 12, Brokerage Practices, for additional discussion concerning other compensation.

Item 15 – Custody

Custody, as it applies to investment advisors, has been defined by regulators as having access or control over client funds and/or securities. In other words, custody is not limited to physically holding client funds and securities. If an investment adviser has the ability to access or control client funds or securities, the investment adviser is deemed to have custody and must ensure proper procedures are implemented.

HLWM does not accept or maintain physical custody of client's funds or securities. However, HLWM is deemed to have constructive custody of client funds and securities whenever HLWM is given the authority to have fees deducted directly from client accounts. However, this is the only form of custody HLWM will ever maintain.

Clients or an independent representative of the client will direct, in writing, the establishment of all accounts and therefore are aware of the qualified custodian's name, address and the manner in which the funds or securities are maintained. Account statements are delivered directly from Interactive Brokers to each client, or the client's independent representative, at least quarterly. Clients should carefully review those statements and are urged to compare the statements against reports received from HLWM. When clients have questions about their account statements, they should contact Premier Investment Services or the qualified custodian preparing the statement.

Prior to deducting any fees from a client's account, HLWM must have written client authorization to have those fees deducted by a qualified custodian. When fees are deducted from an account, Premier Investment Services is responsible for calculating the fee and delivering instructions to the custodian. At the same time Premier Investment Services instructs the custodian to deduct fees from your account; Premier Investment Services will send you an invoice itemizing the fee. Itemization will include the formula used to calculate the fee, the amount of assets under management the fee is based on, and the time period covered by the fee.

Item 16 – Investment Discretion

When providing asset management services, HLWM maintains trading authorization over your Account and can provide management services on a **discretionary** basis. When discretionary authority is granted, we will have the authority to determine the type of securities and the amount of securities that can be bought or sold for your portfolio without obtaining your consent for each transaction.

Once the above factors are agreed upon, we will be responsible for making decisions regarding the timing of buying or selling an investment and the price at which the investment is bought or sold.

You will have the ability to place reasonable restrictions on the types of investments that may be purchased in your Account. You may also place reasonable limitations on the discretionary power granted to HLWM so long as the limitations are specifically set forth or included as an attachment to the client agreement.

Item 17 – Voting Client Securities

Proxy Voting

HLWM does not vote proxies on behalf of Clients. We have determined that taking on the responsibilities for voting client securities does not add enough value to the services provided to you to justify the additional compliance and regulatory costs associated with voting client securities. Therefore, it is your responsibility to vote all proxies for securities held in Account.

You will receive proxies directly from the qualified custodian or transfer agent; we will not provide you with the proxies. You are encouraged to read through the information provided with the proxy-voting documents and make a determination based on the information provided. If the client has questions about a particular proxy they can call the firm.

Item 18 – Financial Information

HLWM does not require or solicit prepayment of more than \$500 in fees per client, six months or more in advance. Therefore, we are not required to include a balance sheet for the most recent fiscal year. We are not subject to a financial condition that is reasonably likely to impair our ability to meet contractual commitments to clients. Finally, HLWM has not been the subject of a bankruptcy petition at any time.

Item 19 – Requirements for State-Registered Advisers

Executive Officer and Management Personnel

Donald T Hill Jr

Educational Background:

Florida Institute of Technology, Aviation Management With Flight: 2015

Business Experience:

Premier Investment Services, 04/2021 to Present;
United States Air Force, military Mobility Pilot, 02/2016 to Present
American Airlines, Pilot 11/02/2022 to Present
Piedmont Airlines, Pilot, 08/2016 to 03/2021
Crosswinds Flight School, Certified Flight Instructor, 05/2014 to 08/2016
Enroute Computer Solutions, Intern, 05/2011 to 08/2011

Kyle J. LaBarre

Educational Background:

Brigham Young University, BS – Exercise Science: 2015
Colorado State University, Global Campus, Studied Finance, Dates Attended: 10/2020 to Present

Business Experience:

Premier Investment Services, Managing Member, 04/2021 to Present;
U.S. Air Force, Navigator, 01/2017 to Present
Peak View Park, Sales, 09/2016 to 01/2016
Vendere Partners, Business Development, 02/2016 to 09/2016
Olive Garden, Server, 01/2016 to 03/2016
Mountain Vista Apartments, Apartment Manager, 04/2014 to 10/2015
Villa Texas Insurance Services, Partner, 01/2014 to Present
1-800 Contacts, Customer Service, 06/2013 to 12/2013
InsideSales.com, Business Development, 06/2012 to 06/2013
BYU Broadcasting, Customer Service, 12/2010 to 06/2012

Donald T Hill Sr

Business Experience:

Hill and LaBarre Wealth Management, 04/2021 to Present;
SETPA Train Engineer, 04/18/1988 to Present
NTSB Safety Investigator Assistant, 03/10/2014 to Present

Other Business Activities

See Item 10 – Other Financial Industry Activities and Affiliations.

No Performance Based Fees

As previously disclosed in *Item 6*, Premier Investment Services does not charge or accept performance based fees.

No Arbitrations

Premier Investment Services or any of its associated persons have not been the subject of any client arbitrations or similar legal disputes.

No Arrangement with Issuer of Securities

Premier Investment Services and its management do not have any relationship or arrangement with any issuer of securities.

Business Continuity Plan

Premier Investment Services has a business continuity and contingency plan in place designed to respond to significant business disruptions. These disruptions can be both internal and external. Internal disruptions will impact our ability to communicate and do business, such as a fire in the office building. External disruptions will prevent the operation of the securities markets or the operations of a number of firms, such as earthquakes, wildfires, hurricanes, terrorist attack or other wide-scale, regional disruptions.

Our continuity and contingency plan has been developed to safeguard employees' lives and firm property, to allow a method of making financial and operational assessments, to quickly recover and resume business operations, to protect books and records, and to allow clients to continue transacting business.

The plan includes the following:

- Alternate locations to conduct business;
- Hard and electronic back-ups of records;
- Alternative means of communications with employees, clients, critical business constituents and regulators; and
- Details on the firms' employee succession plan

Our business continuity and contingency plan is reviewed and updated on a regular basis to ensure that the policies in place are sufficient and operational.

Customer Privacy Policy Notice

Commitment to Your Private Information: Premier Investment Services has a long standing policy of protecting the confidentiality and security information we collect about our clients. We do not, and will not, share nonpublic personal information about you (“Information”) with outside third parties without your consent, except for the specific purposes described below. This notice has been provided to you to describe the Information we may gather and the situations under which we may need to share it.

Why We Collect and How We Use Information. We limit the collection and use of Information within our firm to only those individuals associated or employed with us that must have Information to provide financial services to you. Such services include maintaining your accounts, processing transaction requests, providing financial planning, financial consultation, and other services described in our Form ADV.

How We Gather Information. We get most Information directly from you when you provide us with information from any of the following sources:

- Applications or forms (for example: name, address, social security number, birth date, assets, income, financial history)
- Transactional activity in your account (for example: trading history and account balances)
- Information services and consumer reporting sources (for example: to verify your identity or to assess your credit history)
- Other sources with your consent (for example: your insurance professional, attorney, or accountant)

How We Protect Information. Our employees and affiliated persons are required to protect the confidentiality of Information and to comply with our stated policies. They may access Information only when there is an acceptable reason to do so, such as to service your account or provide you with financial services. Employees who violate our Privacy Policy are subject to disciplinary action, up to and including termination from employment with us. We also maintain physical, electronic, and procedural safeguards to protect information, which comply with applicable SEC, state, and federal laws.

Sharing Information with Other Companies Permitted Under Law. We do not disclose Information obtained in the course of our practice except as required or permitted under law. Permitted disclosures include, for instance, providing information to unrelated third parties who need to know such Information in order to assist use with the providing services to you. Unrelated third parties may include broker/dealers, mutual fund companies, insurance companies, and the custodian with which your assets are held. In such situations, we stress the confidential nature of information being shared.

Former Customers. Even if we cease to provide you with financial products or services, our Privacy Policy will continue to apply to you and we will continue to treat your nonpublic information with strict confidentiality.

Form ADV Part 2B: Brochure Supplement - Donald T. Hill Jr.

Item 1 – Cover Page

Donald T. Hill Jr.
Premier Investment Services, LLC
Doing business as Hill and LaBarre Wealth Management
951 Honeysuckle Ct.
Williamstown, NJ 08094
856-562-8080

Date of Supplement: April 2021

This brochure supplement provides information about Donald T. Hill Jr that supplements the Premier Investment Services, LLC Doing business as Hill and LaBarre Wealth Management disclosure brochure. You should have received a copy of that brochure. Please contact Donald T. Hill Jr at 856-562-8080 or at DHillJr@HLWealthTeam.com if you did not receive Premier Investment Services, LLC 's brochure or if you have any questions about the contents of this supplement.

Additional information about Donald T. Hill Jr is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 – Educational Background and Business Experience

Donald T. Hill Jr

Born 1993, CRD # 7361050

Donald T. Hill, Jr.

Post-Secondary Educational Background:

Florida Institute of Technology, Aviation Management With Flight: 2015

Business Experience:

Hill and LaBarre Wealth Management, 04/2021 to Present;
United States Air Force, Military Mobility Pilot, 02/2016 to Present
American Airlines Pilot 11/2022 to Present
Piedmont Airlines, Pilot, 08/2016 to 11/2022
Crosswinds Flight School, Certified Flight Instructor, 05/2014 to 08/2016
Enroute Computer Solutions, Intern, 05/2011 to 08/2011

Item 3 – Disciplinary Information

Donald T. Hill Jr has no legal or disciplinary events to report.

Item 4 – Other Business Activities

Donald T. Hill Jr. has no other business activities to report..

Item 5 – Additional Compensation

Donald T. Hill Jr has no additional compensation to report.

Item 6 – Supervision

Kyle J. LaBarre is the Chief Compliance Officer of HLWM, LLC. He is responsible for overseeing and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives, including Donald T. Hill Jr. Kyle J. LaBarre can be contacted at 719-645-9114.

Item 7 – Requirements for State-Registered Advisers

Donald T. Hill Jr has not been involved in an arbitration award and has not been found liable in an arbitration claim alleging damages in excess of \$2,500. He has not been involved in any award or found liable in any civil, self-regulatory organization, or administrative proceeding. Additionally, he has not been the subject of a bankruptcy petition.

Form ADV Part 2B: Brochure Supplement - Kyle J. LaBarre

Item 1 – Cover Page

Kyle J. LaBarre
Premier Investment Services, LLC
Doing business as Hill and LaBarre Wealth Management
951 Honeysuckle Ct.
Williamstown, NJ 08094
856-562-8080

Date of Supplement: April 2021

This brochure supplement provides information about Kyle J. LaBarre that supplements the Premier Investment Services, LLC Doing business as Hill and LaBarre Wealth Management disclosure brochure. You should have received a copy of that brochure. Please contact Donald T. Hill Jr at 856-562-8080 or at DHillJr@HLWealthTeam.com if you did not receive Premier Investment Services, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Kyle J. LaBarre is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 – Educational Background and Business Experience

Kyle J. LaBarre

Born 1989, CRD # 7361246

Post-Secondary Educational Background:

Kyle J. LaBarre

Educational Background:

Brigham Young University, BS – Exercise Science: 2015
Colorado State University, Global Campus, Studied Finance, Dates Attended: 10/2020 to Present

Business Experience:

Hill and LaBarre Wealth Management, Managing Member, 04/2021 to Present;
U.S. Air Force, Navigator, 01/2017 to Present
Peak View Park, Sales, 09/2016 to 01/2016
Vendere Partners, Business Development, 02/2016 to 09/2016
Olive Garden, Server, 01/2016 to 03/2016
Mountain Vista Apartments, Apartment Manager, 04/2014 to 10/2015
Villa Texas Insurance Services, Partner, 01/2014 to Present
1-800 Contacts, Customer Service, 06/2013 to 12/2013

InsideSales.com, Business Development, 06/2012 to 06/2013
BYU Broadcasting, Customer Service, 12/2010 to 06/2012

Item 3 – Disciplinary Information

Kyle J. LaBarre has no legal or disciplinary events to report.

Item 4 – Other Business Activities

Kyle J. LaBarre is a current member of the United States Air Force, he spends approximately 70% of his time on this activity.

Item 5 – Additional Compensation

Kyle J. LaBarre has no additional compensation to report.

Item 6 – Supervision

Kyle J. LaBarre is the Chief Compliance Officer of HLWM, LLC. He is responsible for overseeing and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives. Kyle J. LaBarre can be contacted at 719-645-9114.

Item 7 – Requirements for State-Registered Advisers

Kyle J. LaBarre has not been involved in an arbitration award and has not been found liable in an arbitration claim alleging damages in excess of \$2,500. He has not been involved in any award or found liable in any civil, self-regulatory organization, or administrative proceeding. Additionally, he has not been the subject of a bankruptcy petition.

Form ADV Part 2B: Brochure Supplement - Donald T. Hill Sr.

Item 1 – Cover Page

Donald T. Hill Sr.
Premier Investment Services, LLC
Doing business as Hill and LaBarre Wealth Management
951 Honeysuckle Ct.
Williamstown, NJ 08094
856-562-8080

Date of Supplement: April 2021

This brochure supplement provides information about Donald T. Hill Sr that supplements the Premier Investment Services, LLC Doing business as Hill and LaBarre Wealth Management disclosure brochure. You should have received a copy of that brochure. Please contact Donald T. Hill Jr at 856-562-8080 or at DHillJr@HLWealthTeam.com if you did not receive Premier Investment Services, LLC 's brochure or if you have any questions about the contents of this supplement.

Additional information about Donald T. Hill Sr. is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 – Educational Background and Business Experience

Donald T. Hill Sr.

Born 1963, CRD # 7363468

Donald T. Hill, Sr.

Business Experience:

Hill and LaBarre Wealth Management, 04/2021 to Present;

SETPA Train Engineer, 04/18/1988 to Present

NTSB Safety Investigator Assistant, 03/10/2014 to Present

Item 3 – Disciplinary Information

Donald T. Hill Jr has no legal or disciplinary events to report.

Item 4 – Other Business Activities

Donald T. Hill Sr. has no other business activities to report.

Item 5 – Additional Compensation

Donald T. Hill Sr. has no additional compensation to report.

Item 6 – Supervision

Kyle J. LaBarre is the Chief Compliance Officer of HLWM, LLC. He is responsible for overseeing and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives, including Donald T. Hill Sr.

Kyle J. LaBarre can be contacted at 719-645-9114.

Item 7 – Requirements for State-Registered Advisers

Donald T. Hill Sr. has not been involved in an arbitration award and has not been found liable in an arbitration claim alleging damages in excess of \$2,500. He has not been involved in any award or found liable in any civil, self-regulatory organization, or administrative proceeding. Additionally, he has not been the subject of a bankruptcy petition.