



Item 1. Introduction.

Longview Financial Advisers, Inc. ("Longview," "We," "Us" or "Our Firm") is registered with the Securities and Exchange Commission as a registered investment adviser. Brokerage and investment advisory services and fees differ, and it is important for you to understand the differences. Free and simple tools are available to research firms and financial professionals at [Investor.gov/CRS](https://www.investor.gov/CRS), which also provides educational materials about broker-dealers, investment advisers, and investing.

Item 2. Relationships and Services.

What investment services and advice can you provide me?

We provide investment advisory services, including discretionary investment management and financial planning services to individuals, trusts and estates (our "retail investors").

When a retail investor engages us to provide investment management services we shall monitor, on a continuous basis, the investments in the accounts over which we have authority as part of our investment management service. Furthermore, when engaged on a discretionary basis, we shall have the authority, without prior consultation with you (unless you impose restrictions on our discretionary authority), to buy, sell, trade and allocate the investments within your account(s) consistent with your investment objectives. Our authority over your account(s) shall continue until our engagement is terminated.

We offer investment management and financial planning services as part of our standard investment advisory engagement. However, we may be engaged to provide financial planning services on a separate fee basis. When we provide financial planning services, we rely upon the information provided by the client for our financial analysis and do not verify any such information while providing this service.

We do not limit the scope of our investment advisor services to proprietary products or a limited group or type of investment.

For additional information, please see Form [ADV Part 2A](#) brochure, Items 4 and 7. Conversation Starters. Ask your financial professional:

- 1) *How will you choose investments to recommend to me?*
- 2) *What is your relevant experience, including your licenses, education and other qualifications? What do those qualifications mean?*

Item 3. Fees, Costs, Conflicts, and Standard of Conduct.

What fees will I pay?

Fees are determined based on the service model requested. Longview offers three service models: Capstone Model, Planning Only and Investment Only. Our Capstone includes both financial planning and investment management services.

Asset under management fees are billed quarterly, in arrears. Investment management fees are based on the balance in the account on the last day of the quarter. Fees for the Financial Planning Only model are billed by proposal and are determined by complexity and time required. The minimum fee for Investment-Only services is \$2,500. The minimum fee for our Capstone and Financial Planning Only service models is \$7,500.

You are responsible for the payment of all third-party fees which include mutual fund and ETF expense ratios, brokerage commissions, transactions fees, operating fees and other related costs and expenses. Those fees are separate and distinct from the fees charged by our firm. As your assets under our management

increase, so will the amount you pay us in fees. Therefore, we have a duty to disclose that there is an underlying incentive to encourage you to increase the assets in your account. This can create a conflict of interest at times, which we agree to disclose. You will pay fees and costs whether you make or lose money on your investments. However, those fees will decrease if your invested assets decrease. Please make sure you understand what fees and costs you are paying. We are always available to answer any questions around fees.

For additional information, please see Form [ADV Part 2A](#) brochure, Items 5 and 6. Conversation Starters. Ask your financial professionals:

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. A common example of this is when we are asked if someone should pay off their mortgage using assets we manage. We have a duty to disclose the conflict and then give you advice in your best interest, which may affect the amount of assets under our management and subject to our fees. For more information about any potential conflicts of interest we may have, you may view our Form [ADV Part 2A](#).

Conversation Starter. Ask your financial professionals: *How might your conflicts of interest affect me, and how will you address them?*

For additional information, please see Form [ADV Part 2A](#) brochure, Items 12 and 17.

How do your financial professionals make money?

Our financial professionals are paid a base salary. They may also earn bonuses based on the revenue and profit margin performance of the firm. They may also earn a bonus for client referrals to Longview. There are no commissions or fees earned from other sources.

Item 4. Disciplinary History.

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 your financial professionals.

Conversation Starters. Ask your financial professionals:

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

Item 5.

Additional Information.

You can find additional information about our investment advisory services at www.longviewfa.com. You can also request a copy of the client relationship summary by calling 256-534-1196. Our Form [ADV Part 2A](#) and this Relationship Summary can also be found at adviserinfo.sec.gov

Conversation Starters. Ask your financial professionals:

Who is my primary contact person? Is he or she a representative of an investment adviser or a broker-dealer?