March 17, 2026

FORM CRS RELATIONSHIP SUMMARY DISCLOSURE

EverSource Wealth Advisors, LLC ("EverSource") is an investment advisor registered with the U.S. Securities and Exchange Commission.

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, which also provides educational materials about broker-dealers, investment advisors, and investing.

What investment services and advice can you provide me?

EverSource provides investment advice and financial planning services to individuals, businesses, families, estates and trusts. Our investment advisors will work with you to understand your goals, objectives and circumstances. Based upon that information, we will develop an investment plan and a recommended investment portfolio and strategy and/or financial plan. As a part of our standard investment portfolio management services, we monitor investment portfolios for trading needs and evaluate the potential need for investment strategy changes. For specific accounts where client has given us discretionary authority, we will engage outside advisors to manage a portion of your portfolio where the outside advisor has expertise in a particular area.

We manage advisory accounts on a discretionary or non-discretionary basis, as agreed with you. For discretionary accounts, we will implement transactions without seeking your prior consent. For non-discretionary accounts, we will seek your prior consent for contemplated transactions. Our minimum account size is generally $250,000. EverSource also offers tax planning, estate planning, and consulting services in the areas of compensation plans, family dynamics, and dispute resolution.

CONVERSATION STARTER QUESTIONS TO ASK YOUR FINANCIAL PROFESSIONAL

- Given my financial situation, should I choose an investment advisory service? Why or why not?
- How will you choose investments to recommend to me?
- What is your relevant experience, including your licenses, education and other qualifications? What do these qualifications mean?

Additional information about EverSource and our financial advisors is available at adviserinfo.sec.gov. Please see Items 4 and 7 of our Form ADV Part 2A Disclosure Brochure for more detailed information about our services. Our affiliate BMSS Wesson Wealth Solutions, LLC is also a registered investment advisor which provides investment advisory services.

What fees will I pay?

You will pay EverSource a fee for investment advisory services which is a percentage of the value of the assets we manage for you calculated and debited from your account periodically as set forth in your client agreement. Our fee can range up to 2% annually and is generally "tiered", meaning the percentage used to calculate the fee decreases as the amount of assets you ask us to manage is increased. It is generally the case that we are paid more when you ask us to manage more assets. This arrangement gives us an incentive to recommend you place more assets with us.

CONVERSATION STARTER QUESTIONS TO ASK YOUR FINANCIAL PROFESSIONAL

- 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?

You may also pay fees charged by your account custodian, such as account fees and broker commissions; expense ratios and commissions charged by mutual funds and exchange-traded funds; and any fees charged by third-party asset managers we retain with discretionary authority. We do not receive any portion of these third-party charges. If you prefer, your advisor may charge you a negotiated flat fee for investment advisory services, except for fees and costs the advisor covers.

We also charge investment program fees, which are tied to the investment portfolio your advisor recommends and implements for you. These program fees are calculated based upon the amount of the client's assets in each investment program and, absent an alternative arrangement, are billed to the client 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. Tax planning, estate planning and other consulting services are charged on an hourly or flat fee basis. Make sure you understand what fees and costs you are paying.

Please see our Form ADV Part 2A Items 5.A., B., C. and D. for more detailed information about our fees and costs.

What are your legal obligations to me when acting as my investment advisor? How else does your firm make money and what conflicts of interest do you have?

When we act as your investment advisor, 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.

CONVERSATION STARTER QUESTIONS TO ASK YOUR FINANCIAL PROFESSIONAL

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

Examples of Ways We Make Money and Conflicts of Interest:

- Fees for additional services. You pay us more for any services we provide in addition to investment advisory services, which gives us an incentive to recommend those services to you.
- Insurance commissions. Some of our investment advisors hold an insurance license and may receive a commission for insurance or annuity products they recommend to you, which gives them an incentive to recommend those products. EverSource does not receive any part of these commissions.
- Investment Program Fees. We charge higher fees for investment programs which require more of our firm's resources to implement, such as alternative assets. This could give the firm an incentive to promote the use of those programs which generate a higher fee.

Please see our Form ADV Part 2A for more detailed information about how we make money and our conflicts of interest.

How do your financial professionals make money?

Our investment advisors are paid based upon a percentage of the revenue we receive from you, after deducting any agreed-upon expenses. This compensation arrangement creates an incentive for the advisor to recommend that you bring more assets to EverSource for management and engage EverSource for additional services.

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

No, for our firm. Yes, for our financial professionals. Please visit Investor.gov/CRS for a free and simple search tool to research us and our financial professionals.

CONVERSATION STARTER QUESTIONS TO ASK YOUR FINANCIAL PROFESSIONAL

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

For more information about our services, please visit http://eversourcewealthadvisors.com/or see our Form ADV Part 2A.

For up to date information or to request a copy of this relationship summary, call (205) 982-5515 or email explore@eversourcewa.com

CONVERSATION STARTER QUESTIONS TO ASK YOUR FINANCIAL PROFESSIONAL

- Who is my primary contact person? Is he or she a representative of an investment advisor or a broker- dealer? Who can I talk to if I have concerns?