

## **Strategic Advisory Partners, LLC**

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Dated: March 25, 2026

### **Form ADV Part 2A Appendix 1 – Wrap Fee Program Brochure**

This Wrap Fee Program Brochure provides information about the qualifications and business practices of Strategic Advisory Partners, LLC. If you have any questions about the contents of this Brochure, please contact us at (336) 790-2560. The information in this Brochure has not been approved or verified by the United States Securities and Exchange Commission (“SEC”) or by any state securities authority.

Strategic Advisory Partners, LLC, registered as an Investment Advisor with the SEC. Registration of an Investment Advisor does not imply any level of skill or training. You are encouraged to review both this Brochure and the Brochure Supplements any of our firm’s associates who advise you for more information on the qualifications of our firm and our employees.

Additional information about Strategic Advisory Partners, LLC is available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov), which can be found using the firm’s CRD number, 314842.

## **Item 2 Summary of Material Changes**

Strategic Advisory Partners, LLC is required to advise you of any material changes to our Wrap Fee Program Brochure (“Wrap Brochure”) from our last annual update, identify those changes on the cover page of our Wrap Brochure or on the page immediately following the cover page, or in a separate communication accompanying our Wrap Brochure. We must state clearly that we are discussing only material changes since the last annual update of our Wrap Brochure, and we must provide the date of the last annual update of our Wrap Brochure.

Please note we do not have to provide this information to a client or prospective client who has not received a previous version of our Wrap Brochure.

This brochure, dated March 25, 2026, replaces the version dated July 2, 2025. Since the filing of our last annual updating amendment, dated January 28, 2025, we do not have material changes to this brochure to report.

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## Item 4 Services, Fees, and Compensation

### Description of Our Services

We offer wrap fee programs as described in this Wrap Fee Program Brochure. Our wrap fee accounts are managed on an individualized basis according to the client's investment objectives, financial goals, risk tolerance, etc.

### Types of Advisory Services

We offer the following services:

#### Investment Management Services

We are in the business of managing individually tailored investment portfolios. Our firm provides continuous advice to a Client regarding the investment of Client funds based on the individual needs of the Client. Through personal discussions in which goals and objectives based on a Client's particular circumstances are established, we develop a Client's personal investment policy or an investment plan with an asset allocation target and create and manage a portfolio based on that policy and allocation targets. We will also review and discuss a Client's prior investment history, as well as family composition and background.

Account supervision is guided by the stated objectives of the Client (e.g., maximum capital appreciation, growth, income, or growth, and income), as well as tax considerations. Clients may impose reasonable restrictions on investing in certain securities, types of securities, or industry sectors.

#### Investment Advisory Services Wrap Fee Program Fee Schedule

Our standard advisory fee is based on the market value of the assets under management and is calculated as follows:

#### Investment Management Services

Our standard advisory fee is based on the market value of the assets under management and is calculated as follows:

Account Value	Annual Advisory Fee
\$0 - \$500,000	1.50%
\$500,001 - \$1,000,000	1.25%
\$1,000,001 - \$3,000,000	0.95%
\$3,000,001 - \$5,000,000	0.75%
\$5,000,001 and Above	0.55%

The annual fees are negotiable and are prorated and paid in advance on a quarterly basis. The advisory fee is a blended fee and is calculated by assessing the percentage rates using the predefined levels of assets as shown in the above chart resulting in a combined weighted fee. For example, an account valued at \$3,000,000 would pay an effective fee of 1.09% with the annual fee of \$32,750. The quarterly fee is determined by the following calculation:  $(\$500,000 \times 1.50\%) + (\$500,000 \times 1.25\%) +$

$(\$2,000,000 \times 0.95\%) \div 4 = \$8,187.50$ . No increase in the annual fee shall be effective without agreement from the Client by signing a new agreement or amendment to their current advisory agreement. The minimum annual fee for Investment Management Services is \$6,000. For combined household assets below \$250,000, there will be a \$4 per account charge each month.

Advisory fees are directly debited from Client accounts held at an unaffiliated third-party custodian, or the Client may choose to pay by electronic funds transfer, debit/credit card or check. Accounts initiated or terminated during a calendar quarter will be charged a prorated fee based on the amount of time remaining in the billing period. An account may be terminated with written notice at least 30 calendar days in advance. Strategic is the sponsor and portfolio manager of this Wrap Fee Program. Strategic receives investment advisory fees paid by Clients for participating in the Wrap Fee Program and pays the Custodian for the costs associated with the normal trading activity in client account(s).

### **Additional bundled Service Cost Considerations**

A wrap fee program allows our clients to pay a specified fee for investment advisory services and the execution of transactions. The advisory services may include portfolio management and the fee is not based directly upon transactions in the client's account. The client's fee is bundled with our costs for executing transactions in his or her account(s). This results in a higher advisory fee. We do not charge our clients higher advisory fees based on their trading activity, but you should be aware that we may have an incentive to limit our trading activities in your account(s) because we are charged for executed trades. By participating in a wrap fee program, you may end up paying more or less than you would through a non-wrap fee program where a lower advisory fee is charged, but trade execution costs are passed directly through to you by the executing broker.

### **Additional Expenses Not Included in the Wrap Program Fee**

You may pay custodial fees (charges imposed directly by a mutual fund, index fund, or exchange-traded fund) which shall be disclosed in the fund's prospectus (e.g., fund management fees and other fund expenses), mark-ups and mark-downs, spreads paid to market makers, wire transfer fees, and other fees and taxes on brokerage accounts and securities transactions. These fees are not included within the wrap fee you are charged by our firm.

We may invest clients in No Transaction Fee (NTF) funds when available. The NTF funds do not pay the custodian a ticket charge, unlike a regular fund; however, it does incur a higher expense ratio than normal funds. Because we offer our advisory services under a wrap program where we pay all ticket charges incurred, we have a financial interest to minimize these charges.

### **Compensation**

Our investment advisory representatives receive a portion of the advisory fee that you pay us, either directly as a percentage of your overall fee or as their salary from our firm. In cases where our investment advisory representatives are paid a percentage of your overall advisory fee, this may create an incentive to recommend that you participate in a wrap fee program rather than a non-wrap fee program (where you would pay for trade execution costs) or brokerage account where commissions are charged. This is because, in some cases, we may stand to earn more compensation from advisory fees paid to us through a wrap fee program arrangement if your account is not actively traded.

### **Item 5 Account Requirements and Types of Clients**

We provide financial planning and portfolio management services to individuals, high net-worth individuals, pension and profit sharing plans, and corporations or other businesses.

Our minimum account size requirement is \$500,000, which may be waived at the firm's discretion.

## **Item 6 Portfolio Manager Selection and Evaluation**

The Strategic Advisory Partners wrap program does not select other advisers, as Strategic is the only portfolio manager for the program.

Additional information can be found in the following items of ADV Part 2A, which accompanies this Wrap Brochure: Item 4 – Advisory Business; Item 6 – Performance-Based Fees and Side-By-Side Management; Item 8 – Methods of Analysis, Investment Strategies and Risk of Loss; and Item 17 – Voting Client Securities.

## **Item 7 Client Information Provided to Portfolio Managers**

Strategic is the sponsor and sole portfolio manager for the Wrap Fee Program. The adviser does not share client information with other portfolio managers.

## **Item 8 Client Contact with Portfolio Managers**

Strategic is the only direct portfolio manager under this Wrap Program. Our clients may directly contact us with questions or concerns by calling the number on this Brochure. There are no restrictions placed on the client's ability to contact or consult with Strategic.

## **Item 9 Additional Information**

### **Disciplinary Information**

We have determined that our firm and management have no disciplinary information to disclose.

### **Other Financial Industry Activities and Affiliations**

Please see ADV Part 2A for more information in the following areas: Item 10 – Other Financial Industry Activities and Affiliations, Item 11 – Code of Ethics, Item 13 – Review of Accounts, Item 14 – Client Referrals and Other Compensation, and Item 18 – Financial Information.