Form CRS (a relationship summary)

March 16, 2026

SherClar, Inc. doing business as (DBA) Clearview Wealth Management (Firm, our, we, us). We are registered with the Securities and Exchange Commission as an investment adviser. Form CRS is reviewed annually. No material changes, except our annual minimum fee, have been made since the initial May 2020 filing.

Brokerage and investment advisory services and their fees can differ. It is important that retail investors understand the differences. There are free and simple tools available to research firms and financial professionals at Investor.gov/CRS which also provides educational materials about broker-dealers, investment advisers and investing.

What investment services and advice can you provide me?

The Firm offers financial planning and investment advisory services to retail investors. Planning services include retirement, tax, risk (insurance) and other cash management strategies to meet financial goals. Investment services include risk appropriate strategies using a diverse mix of publicly traded stocks, mutual funds, exchange traded funds (ETFs) and individual bonds. We monitor investments regularly including quarterly investment summaries and annual performance. The Firm has complete authority (discretion), without limitations, to make investment changes in client accounts. We use publicly traded securities and do not offer proprietary, private investments. We do not have account minimums but charge a minimum fee. Details can be found in the Advisory Business section of our Firm Brochure, Part 2A Form ADV. Firm Brochure

Deciding whether or not to engage a professional for advisory services is based on many factors. These might include the complexity of your situation, your knowledge of financial concepts and strategies and what you consider to be a reasonable fee for services. Before making a decision, interview multiple advisors comparing their services and costs while also deciding whether the person you will presumably work with, seems genuine and trustworthy. To get the conversation started, consider asking the following open-ended questions.

Given my financial situation, should I choose an investment advisory service? Why or why not?

How will you choose investments to recommend to me?

What is your relevant experience, including your licenses, education and other qualifications? What do these qualifications mean?

What fees will I pay?

Our fee is calculated as a percentage of the market value of assets under our direct management. The fee is determined on account values at the end of each quarter. Fees are debited from designated accounts in the month following quarter end. We have an annual minimum fee of $5,000 billed at $1,250 each quarter. No other fees are charged for our service other than the two – percentage of market value or minimum fee - described. Because more assets under our direct management mean more fees, there might be incentive for us to encourage you to increase assets in your accounts. Other fees, not received by us, might include mutual fund or third-party manager fees and trading fees. Details can be found in the Fees and Compensation section of our Firm Brochure, Part 2A Form ADV. Firm Brochure

You will pay fees and costs whether you make or lose money on your investments. Fees and costs will reduce the amount of money you make on your investments over time. Please make sure you understand what fees and costs you are paying.

To initiate a conversation about fees, consider asking the following question.

Help me understand how these fees and costs might affect my investments. If I give you $10,000 to invest, how much will go to fees and costs, and how much will be invested for me?

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

When we act as your investment adviser, we have to act in your best interest and not put our interest ahead of yours. At the same time, the way we make money creates some conflicts with your interests. You should understand and ask us about these conflicts because they can affect the investment advice we provide you. Here are examples to help you understand what this means.

As a Fee-Only financial adviser affiliated with The National Association of Personal Financial Advisers (NAPFA) we are compensated solely by the client. This NAPFA affiliation prohibits us from receiving compensation that is tied to the purchase or sale of any financial product. However, because more assets under our direct management mean more fees, there might be incentive for us to encourage you to increase assets in your accounts. One example of this would be for us to recommend that you roll over a company sponsored retirement plan to an account we manage. Another would be for us to recommend you add money to one of your investment accounts instead of using that money to pay down debt. Details about how we act in your best interest can be found in the Advisory Business section, sub-section Fiduciary Standard of Conduct, of our Firm Brochure, Part 2A Form ADV. Firm Brochure

To expand on this important topic, ask the professional adviser you are considering this question.

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

How do your financial professionals make money?

Our professionals are compensated with a fixed salary and bonus. The salary is based on their professional credentials, responsibilities and experience. Bonus is a percentage of salary and paid based on personal performance metrics. These metrics are not designed to incent or overly encourage new client acquisition or additional assets over what we believe to be a good fit for the client and us.

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

No. Our professionals do not have any legal or disciplinary history. Visit Investor.gov/CRS to research us and other financial professionals you might be considering.

To start a conversation on this subject, ask the individual you are considering:

As a financial professional, do you have any disciplinary history? If so, what type?

You can find additional information about our firm by visiting our website at www.clearviewwealthmgmt.com. You may also call us at 704-837-4317 to request additional information, our Firm Brochure, Part 2A Form ADV and our Brochure Supplement Part 2B Form ADV. You may also request a copy of this relationship summary Form CRS.

Because it is important to know who to contact at the firm and where to direct questions or complaints, consider directing this question to the financial professional you are considering.

Who is my primary contact person? Is he or she a representative of an investment adviser or a broker-dealer? Who can I talk to if I have concerns about how this person is treating me?