BOX HILL PRIVATE WEALTH LLC
Form ADV Part 3 – Client Relationship Summary

Date: 10/27/2026

Summary of Material Changes: Since our prior version dated 02/24/2026, Items 2 and 3 were updated to reflect that we may recommend alternative investments to eligible clients, and the related fees and conflicts of interest. Please review this Client Relationship Summary in its entirety.

Item 1: Introduction

Box Hill Private Wealth LLC is an investment adviser registered with the Securities and Exchange Commission offering advisory accounts and services. Brokerage and investment advisory services and fees differ, and it is important that you understand the differences. This document gives you a summary of the types of services and fees we offer. Please visit www.investor.gov/CRS for free, simple tools to research firms and financial professionals, as well as educational materials about broker-dealers, investment advisers, and investing.

Item 2: Relationships and Services

What investment services and advice can you provide me? We offer portfolio management (we review your portfolio, investment strategy, and investments) and financial planning (we assess your financial situation and provide advice to meet your goals) to retail clients, including individuals, high-net-worth individuals, trusts, charitable accounts, and small businesses. We monitor client accounts on at least a quarterly basis. We provide discretionary advisory services, meaning we make investment decisions on your behalf without requiring prior approval for each transaction. We do not limit our advice to proprietary products or a specific type of investment. For eligible clients, we may also recommend alternative investments (e.g., interval, tender offer and private funds), which have limited or no liquidity and may require investor eligibility and your signed subscription documents. Our minimum account size is $1,000,000, which may be waived at our discretion. Please see our Form ADV Part 2A ("Brochure"), Items 4, 7, 8 & 16.

Questions to ask us: ***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?***

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

What fees will I pay?

Our advisory fees for individually managed accounts are tiered based on account size, starting at 1.00% annually and reducing to a rate of 0.50% for accounts above $10M as assets increase. For financial planning and consulting services, we charge an hourly fee of $250. Asset-based fees are withdrawn directly from your account with your written authorization on a quarterly basis, in arrears. Financial planning fees are paid via wire upon completion.

Some investments (e.g., mutual funds, structured notes, alternative investments) impose additional product-level fees that reduce investment value over time. Alternative investments have higher, layered fees (e.g., performance, underlying fund, repurchase and platform fees); our fee is charged on their sponsor-reported value (for private funds, only on called capital). You will also pay any custodian and transaction fees applicable to your 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. Please make sure you understand what fees and costs you are paying. Please see Item 5 of our Brochure for full details.

Questions to ask us: ***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 some examples to help you understand what this means:

- Our AUM fee gives us an incentive to increase the assets in your account.
- Our hourly fee gives us an incentive to perform more work for you.
- We recommend Schwab as custodian, from whom we receive support services and products that benefit our firm. This creates an incentive to recommend Schwab over other custodians; however, our custodian selection is driven primarily by the best interest of our clients.
- Our fee applies to alternative investments at values reported by the fund sponsor, giving us an incentive to recommend them. Platforms (e.g., Schwab, CAIS) and sponsors may give us research and tools at no or reduced cost; we receive no placement fees or revenue sharing.
- If we recommend rolling over retirement plan assets into an account we manage, we earn additional fees, which is a conflict of interest. No client is under any obligation to roll over retirement assets to us.

Questions to ask us: ***How might your conflicts of interest affect me, and how will you address them?***

For more information about our conflicts of interest, please see Items 5, 11, 12 and 14 of our Brochure.

How do your financial professionals make money?

We are a fee-only firm. We receive compensation solely from the advisory fees our clients pay us — we do not accept commissions or third-party payments of any kind. Please see Items 11, 12 and 14 of our Brochure for additional details.

Item 4: Disciplinary History

Do you or your financial professionals have legal or disciplinary history? No, we do not have legal or disciplinary history. Visit https://www.investor.gov/CRS for a free, simple search tool to research us and our financial professionals.

Questions to ask us: ***As a financial professional, do you have any disciplinary history? For what type of conduct?***

Item 5: Additional Information

For additional information about our advisory services, see our Brochure at adviserinfo.sec.gov/firm/summary/322620 or visit www.BoxHillPrivateWealth.com. To request a copy of this Client Relationship Summary or our Brochure, or if you have any questions, please contact us at 480-672-2800.

Questions to ask us: ***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?***