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Relationship Summary

Form CRS: For Use by a FP who is a RR of the BD & who is also an IAR with an Independent IA.

Item 1: Introduction

version: 07.21.21

United Planners Financial Services (United Planners or UP) is a national wealth management firm that is registered with the Securities & Exchange Commission (SEC) as an Investment Advisor (IA) and a Broker-Dealer (BD). We are also a member of the Financial Industry Regulatory Authority (FINRA) and the Securities Investors Protection Corporation (SIPC). We offer advisory & brokerage services and the related fees & costs to each service varies depending on the capacity in which you engage our services, so it is important to know the differences. Given the importance of these details, we encourage you to review Investor.gov/CRS to access free & simple tools to research firms & financial professionals in our industry as well as get access to educational materials about IAs, BDs and investing. We have included "conversation starters" to assist you in engaging in a dialogue with your Financial Professional about your individual circumstances, needs and goals. We encourage you to get the answers to all the questions presented in this Relationship Summary.

Item 2: Relationship & Services

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For more information abotu 1.) Variable Annuity Fees & Costs