



## Customer Relationship Summary “Form CRS”

### INTRODUCTION

Autumn Glory Partners, LLC (AGP) is registered with the Securities and Exchange Commission (SEC) as an investment adviser. Brokerage and investment advisory services and fees differ and it is important for you to understand these differences. Free and simple tools are available to research firms and financial professionals at <https://Investor.gov/CRS>, which also provides educational materials about broker-dealers, investment advisers, and investing.

### WHAT INVESTMENT SERVICES AND ADVICE CAN YOU PROVIDE ME?

#### Relationships & Services

We offer investment advisory services to retail and institutional investors, including asset allocation and investment strategy recommendations; third party investment manager due diligence and **monitoring**; allocation management and portfolio rebalancing and custodial oversight. We create, implement, and **monitor** customized portfolios according to your various needs and take **discretionary trading authority** of your account(s). This means you give us the ability to determine the investments to buy or sell in your account on an ongoing basis. As part of our standard services, we typically review accounts quarterly, but no less than annually, by client request, or as market conditions and individual circumstances change.

**Investment Offerings:** Portfolios are generally diversified across a variety of asset classes including mutual funds, exchange traded funds, separate accounts, private placements, and proprietary selections.

**Account Minimums:** Our minimum managed account size is \$10 million with a minimum annual fee of \$40,000. We will aggregate related accounts for billing purposes or waive the stated minimum account size and annual fee at our discretion.

**Additional information.** Please see [Form ADV, Part 2A](#) brochure (Items 4 and 7) available at <https://www.autumnglorypartners.com/ADV.pdf>

**Conversation Starters:** *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?

#### Fees, Conflicts & Standard of Conduct

We are compensated for our investment advisory services to you as a percentage of assets under management (charged quarterly in arrears). The more assets there are in your account, the more you will pay in fees and we may therefore have an incentive to encourage you to increase the assets in your account. Our fees are distinct from the fees and expenses charged by mutual funds and exchange traded funds, custodians, broker-dealers and third party management fees, if applicable.

**Additional Information.** 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 and read our [Form ADV, Part 2A](#) brochure Items 5 and 6 and other applicable documents available at <https://www.autumnglorypartners.com/ADV.pdf>

**Conversation Starters: Help me understand how these fees and costs might affect my investments. If I give you \$10 million 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 must 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. For example, we participate in expense sharing as Jonathan Adamson serves as an adjunct Managing Director to his prior employer in regard to a private equity acquisition made during the time of his employment. He does not make decisions, nor receive compensation in respect to new or upcoming private equity investments. We mitigate this risk by not offering any of our clients investments in these funds.

**Additional information.** Please see [Form ADV, Part 2A](#) brochure and other applicable documents available at <https://www.autumnglorypartners.com/ADV.pdf>

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

#### HOW DO YOUR PROFESSIONALS MAKE MONEY?

We pay our financial professionals a base salary plus bonus based on individual performance.

#### DOES YOUR FINANCIAL PROFESSIONAL HAVE LEGAL OR DISCIPLINARY HISTORY?

##### Disciplinary History

No. Visit <https://Investor.gov/CRS> for a free and simple search tool to research us and our financial professionals or review our [Form ADV, Part 2A](#) brochure also available at <https://www.autumnglorypartners.com/ADV.pdf>.

**Conversation Starters: As a financial professional, do you have any disciplinary history? For what type of conduct?**

#### ADDITIONAL INFORMATION

**For additional information about our services**, please visit our website [www.autumnglorypartners.com](http://www.autumnglorypartners.com). Additional information about us is also available on the SEC's website at [Adviserinfo@sec.gov](mailto:Adviserinfo@sec.gov). If you would like additional, up-to-date information or a copy of this disclosure, please call (214)935-5642.

**Conversation Starters: 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?**