

Investment Performance Services, LLC
FORM CRS – CUSTOMER RELATIONSHIP SUMMARY

March ~~2026~~29, 2022

Item 1. <u>Introduction</u>	Investment Performance Services, LLC (“IPS”) 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 the differences. Free and simple tools are available to research firms and financial professionals at Investor.gov/CRS, which also provides educational materials about broker-dealers, investment advisers, and investing.
Item 2. <u>Relationships and Services</u>	What investment services and advice can you provide me? IPS is an independent, employee-owned, investment consulting firm and provides customized non-discretionary consulting and discretionary services to primarily institutional investors and to a limited number of retail investors. Services include advice with respect to the development of investment guidelines and policies, portfolio reviews and performance evaluations of underlying managers. We may also provide asset allocation recommendations and may review investment manager candidates for a new asset class or to replace a current investment manager. When we provide non-discretionary consulting services, we do not manage client assets or engage in trading activities, and clients have the authority to accept or reject our recommendations. As part of the services we offer to retail investors, IPS provides ongoing advice and monitoring of investments. We monitor holdings on at least a quarterly basis to evaluate the portfolio’s consistency with the client’s goals and strategies. IPS does not have any minimum requirements (such as minimum account size) to open or maintain an account. For more information about our services, please refer to Items 4 and 7 of our Form ADV, Part 2A. Conversation Starters. Ask your financial professional— ● 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.A <u>Fees, Costs, Conflicts, and Standard of Conduct</u>	What fees will I pay? IPS’s investment consulting fees are negotiated based on the specific services provided and the characteristics of the client portfolio advised. These fees, for which IPS bills quarterly, are either fixed in nature, or are calculated as a percentage of the assets with regard to which IPS consults. <u>If you terminate a consulting agreement before the end of the billing period, the investment consulting fee will be pro-rated accordingly.</u> IPS does not charge performance-based fees. IPS may, in its<u>our</u> sole discretion, negotiate or modify fees (higher or lower than the general fee range) for any client due to a variety of factors, including but not limited to: a client’s special circumstances, asset levels, and the type and level of services provided to the client. Because our fees are negotiable, similarly-situated clients could pay different fees. When we charge asset-based fees, we receive higher fees when you increase the amount of assets for which we provide our consulting services. We therefore have an incentive to encourage you to increase the assets for which we provide consulting services. In addition to the fees paid to IPS and any portfolio management fees paid to other investment managers, clients may also incur custodian fees, brokerage fees, and other transaction and investment expenses in connection with their investment activities. 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. For more information about our fees, please refer to Item 5 of our Form ADV, Part 2A. Conversation Starter. Ask your financial professional— ● Help me understand how these fees and costs might affect my investments. If I give you \$10,000 to

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	invest, how much will go to fees and costs, and how much will be invested for me?
Item 3.B <u>Fees, Costs, Conflicts, and Standard of Conduct</u>	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? <i>When we act as your investment adviser</i>, 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 recommendations and investment advice we provide you. Here are some examples to help you understand what this means: Investment managers and other third-party service providers for our clients may pay IPS to attend EPIC, IPS's educational conference devoted to various issues relating to employee benefit plans. Investment manager attendees pay substantially higher registration fees than other attendees, in effect, helping to defray the cost of presenting the conference. IPS has, in the past, earned a profit from presenting the conference, and may continue to do so in the future. IPS generally provides the same types of consulting services to all retail clients; that is, we provide advice on the selection of third-party investment managers, asset allocation and performance. However, fees for similarly situated clients may vary due to a variety of factors, including but not limited to: a client's special circumstances, asset levels, and the type and level of services provided to the client. Because our fees are negotiable, the actual fee paid by a client may be lower or higher than the fees paid by comparable clients receiving similar services. For more information about our conflicts of interest, please refer to Items 10, and 11, and 14 of our Form ADV, Part 2A. Conversation Starter. Ask your financial professional— ● How might your conflicts of interest affect me, and how will you addressthemaddress them? Additional information about conflicts of interest between us and our clients can be found on Part 2A of our Form ADV, which is available at https://adviserinfo.sec.gov/firm/summary/105527. How do your financial professionals make money? Our financial professionals may receive a fixed base salary and may be eligible for an annual discretionary bonus, or may be compensated primarily based on revenue generated from clients. Individual compensation arrangements will vary based on the financial professional's role and services provided to clients. Financial professionals that service many clients or large, complex clients may earn more than other financial professionals. IPS does not pay or receive commissions and does not earn revenue based on a financial professional's recommendations. Financial professionals' compensation is not based on the recommendation of any specific products.
Item 4. <u>Disciplinary History</u>	Do you or your financial professionals have legal or disciplinary history? Yes ☐ No ☒ Visit Investor.gov/CRS for a free and simple search tool to research us and our financial professionals. Conversation Starter. Ask your financial professional— ● As a financial professional, do you have any disciplinary history? For what type of conduct?
Item 5. <u>Additional Information</u>	You may request updated information and a copy of our Relationship Summary by calling (912) 352-2862. Conversation Starter. Ask your financial professional ● 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? ● Add contact information

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Annex

Summary of Changes

Item 3.A has been updated with the following “If a client terminates a consulting agreement before the end of the billing period, the investment consulting fee will be pro-rated accordingly”. Typos were amended.