

Name: _____

Date: _____

A Summary of Your Advisory Relationship with Hartline Investment Corporation

Hartline Investment Corporation is a SEC-registered 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 www.investor.gov/CRS, which also provides educational materials about broker-dealers, investment advisers, and investing.

What investment services and advice can you provide me?	<ul style="list-style-type: none"> • Hartline provides investment advisory services tailored to the needs of retail investors. Services include: investment management, financial coaching, and retirement and estate investment planning. Retail account offerings include IRAs, Individual, Joint, Foundation and Trust accounts. • Hartline starts each relationship by developing a client's investment policy through personal discussions on goals, objectives, time horizon, risk tolerance, and liquidity needs. We then create and manage a portfolio based on that policy, acting as a fiduciary and in the client's best interest. • Investment recommendations are not limited to any specific product or service offered by a broker-dealer or insurance company, and is limited only by what is reasonably available and investable in the United States. • Account supervision is guided by the client's stated objectives (i.e., maximum capital appreciation, growth, income, or growth and income), as well as tax considerations. Clients may impose reasonable restrictions on investing in certain securities, types of securities, or industry sectors. • Hartline continuously monitors client investments and furnishes client reports at least quarterly. • We manage these advisory accounts on a discretionary (we make investment decisions based on your investment policy) and non-discretionary (client has final say on investment decisions) basis. • Hartline's investment professionals draw on an average of 20 years of industry experience to guide investment decisions. • Hartline has a minimum account size of \$1,000,000. Relationships below this value may be negotiable. • More information on Hartline services and team member credentials and experience can be found at https://www.hartlineinv.com/. 	<p>Conversation Starter:</p> <ul style="list-style-type: none"> • <i>Given my financial situation, should I choose an investment advisory service? Why or why not?</i> • <i>How will you choose investments to recommend to me?</i> • <i>What is your relevant experience, including your licenses, education and other qualifications? What do those qualifications mean?</i>
What fees will I pay?	<ul style="list-style-type: none"> • Hartline charges investment advisory fees based on assets under management with a tiered schedule of annual rates of 1.00% for the first \$5 Million, 0.80% for the next \$5 Million, 0.60% for the next \$15 Million and negotiable 	<p>Conversation Starter:</p> <ul style="list-style-type: none"> • <i>Help me understand how these fees and</i>

	<p>beyond \$25 Million. Some account fee rates may be negotiated under certain circumstances.</p> <ul style="list-style-type: none"> • More fee schedule details can be found in our ADV Part 2A. • In addition to our advisory fees, clients are also responsible for any fees and expenses charged by custodians, investment products and those imposed by broker dealers. • <i>"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."</i> 	<p>cost 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?</p>
<p>What are your legal obligations to me when acting as my investment adviser? How else does your firm make money and what conflicts of interests do you have?</p>	<ul style="list-style-type: none"> • <i>"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 may create 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."</i> • Hartline earns fees from our total assets under management and may therefore be incentivized to invest accounts favoring growth and this could conflict with some client's objectives. • More information on conflicts of interest can be found in our ADV Part 2A. 	<p>Conversation Starter:</p> <ul style="list-style-type: none"> • <i>How might your conflicts of interest affect me, and how will you address them?</i>
<p>How do your financial professionals make money?</p>	<ul style="list-style-type: none"> • Investment advisers are compensated based on firm revenue from assets under their management and make no additional compensation based on investment performance or product sales. 	
<p>Do you or your financial professionals have legal or disciplinary history?</p>	<ul style="list-style-type: none"> • No • Visit www.investor.gov/CRS for a free and simple tool to research the firm and its financial professionals. 	<p>Conversation Starter:</p> <ul style="list-style-type: none"> • <i>As a financial professional, do you have any disciplinary history? For what conduct?</i>
<p>Additional Information</p>	<ul style="list-style-type: none"> • Your primary contact at Hartline is your direct investment adviser. If you have any concerns about how this person is treating you, the firm's principal, William Hart, or another adviser is happy to answer any questions. Adviser contact information is available on our website here. • For any additional information on Hartline, please contact your investment adviser, call 888-HARTLINE or visit our website at https://www.hartlineinv.com where you will find up-to-date information on our firm and the current version of Form CRS, relationship summary. 	<p>Conversation Starter:</p> <ul style="list-style-type: none"> • <i>Who is my primary contact person? Is he or she a representative of an investment-advisor or a broker-dealer? Who can I talk to if I have concerns about how this person is treating me?</i>