



Form CRS Client Relationship Summary
March 30, 2021

Sand Hill Global Advisors, LLC (“SHGA”, “Firm”, “we”, “our”, or “us”) is an investment adviser registered with the U.S. Securities and Exchange Commission (“SEC”). The services of and fees for broker-dealers and investment advisory services differ and it is important for you to understand those differences. Free and simple tools are available to you to research SHGA, other firms and financial professionals at [Investor.gov/CRS](https://www.investor.gov/crs), where you may also find important educational materials about broker-dealers, investment advisers and investing.

WHAT INVESTMENT SERVICES AND ADVICE CAN YOU PROVIDE ME?

We offer investment advisory services to retail and other investors, like you, along with wealth management services such as financial planning. When you enter into an investment advisory agreement with us, we gather information about you to analyze

Ask your Wealth Manager the following questions:

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?

your financial situation. An Investment Policy Statement (IPS) is created, reflecting investment guidelines and restrictions on the portfolio. The Firm embraces an open-architecture approach to investing, which includes, but is not limited to, the use of both passive and active vehicles such as index funds, mutual funds, exchange-traded funds, Separately Managed Accounts, limited partnerships, and individual securities such as stocks and bonds. The use of private investments is determined based on client circumstance and desire for liquidity. SHGA does not offer proprietary products. We regularly monitor and rebalance portfolios. Your Wealth Manager will meet with you on a recurring basis to address changes in your financial situation and recommended changes to your portfolio. Our financial planning services range from comprehensive planning to more focused consultations, depending on the needs and arrangements the Firm has with each client. We provide a variety of analytical and administrative services to produce financial statements, illuminate financial risks, evaluate risk tolerance, establish investment strategy, and initiate actions with estate

and/or tax professionals also serving our clients. We primarily manage accounts on a discretionary basis. Discretionary basis means our Firm has authority to determine the type of securities bought and sold, the dollar amounts of the securities to be bought and sold and whether a client’s transaction is aggregated with those of other clients and traded as a “block” without consulting you first. We maintain this discretion until it is revoked (e.g., by termination). You may impose reasonable restrictions on the management of your account. On occasion we are asked to supervise accounts for clients on a non-discretionary basis. Non-discretionary basis means you make the ultimate decision regarding the purchase or sale of investments. Clients that engage us for financial planning services only retain the authority to implement our recommendations or not. Our minimum account size is \$2,500,000, though we reserve the right to waive the minimum asset level.

For further information about our services and advice please read Items 4, 7, and 8 of our Form ADV Part 2A disclosure brochure. For a copy, contact us at 650-854-9150 or info@sandhillglobaladvisors.com.

WHAT FEES WILL I PAY?

We charge an asset-based management fee based on the aggregate value of the Client’s assets under SHGA’s management (“AUM”) as of trade date on the last day of the calendar quarter as calculated by the qualified custodian in accordance with the fee memorialized in the Client’s Wealth Management Agreement. Fees are paid quarterly in advance, ranging up to 1% per annum. The fee is generally negotiable and determined based on a number of factors including, but not limited to, the amount of work involved, the attention needed to manage the account, the existence of family relationships, anticipated future earning capacity, amount of firm resources needed for servicing, etc. Financial planning services and other financial advice provided in conjunction with investment management services are covered by those fees. We also offer financial planning services separately to individuals. The fees for this service range from \$100 to \$300 an hour. We assess a retainer against which hourly costs are applied. We reserve the right to alter this methodology in coordination with the client. Also, you will pay additional fees to third parties in connection with your managed account. These can include (as applicable), custodian fees, transaction

charges, IRA fees, margin interest, wire transfer and electronic fund fees, and other account administrative fees. However, the Firm does not receive any portion of these costs. 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.

More detailed information about our fees and other costs associated with investing, along with applicable conflicts can be found in Items 5, 10, and 14 of our Form ADV Part 2A disclosure brochure. For a copy, contact us by phone at (650) 854-9150 or info@sandhillglobaladvisors.com.

Ask your Wealth Manager:

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.

Ask your Wealth Manager:

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

We receive certain products and services from the broker-dealer/custodians we recommend, which benefit us but may not directly benefit clients or client accounts, such as educational conferences and technology. This creates a conflict as it gives us an incentive to have clients custody their assets at these broker-dealers. Our Firm has no outside financial industry affiliations.

More detailed information about our conflicts of interest can be found in Items 4, 5, 8, 10, 11, 12, and 14 of our Form ADV Part 2A disclosure brochure. For a copy, contact us by phone at (650) 854-9150 or info@sandhillglobaladvisors.com.

HOW DO YOUR FINANCIAL PROFESSIONALS MAKE MONEY?

Our employees are either shareholders or employees of SHGA. All employees are paid a base salary and may receive additional compensation based on a variety of factors, including business development. Shareholders also receive a portion of firm profits (derived from advisory fees less expenses). Our employees do not sell products or receive commissions.

Additional information about compensation for our professionals and related conflicts of interest are found in our Form(s) ADV Part 2B, which is available by contacting us at (650) 854-9150 or info@sandhillglobaladvisors.com.

DO YOU OR YOUR FINANCIAL PROFESSIONALS HAVE LEGAL OR DISCIPLINARY HISTORY?

No. Please go to www.investor.gov/CRS for a free and simple search tool to research us and our financial professionals.

Ask your Wealth Manager:

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

ADDITIONAL INFORMATION

Additional information about our investment advisory services and a copy of this Form CRS can be found at adviserinfo.sec.gov by searching "Sand Hill Global Advisors, LLC" or by contacting us at 650-854-9150 or visiting www.sandhillglobaladvisors.com.

Ask your Wealth Manager:

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?