

George M. Hiller Companies, LLC Form CRS

Item 1 Introduction

03/19/2022

George M. Hiller Companies, LLC is registered with the Securities and Exchange Commission as an Investment Adviser.

Brokerage and investment advisory services and fees differ and it is important for you to understand the differences. The SEC offers free and simple tools to research firms and financial professionals at [Investor.gov/CRS](https://www.investor.gov/CRS) which also provides information tailored to educate retail investors about financial professionals.

Item 2 Relationships and Services

What investment services and advice can you provide me?

Our firm offers the following principal investment advisory services to retail investors: ongoing discretionary and nondiscretionary portfolio management.

If you invest on a discretionary basis, our firm will buy and sell investments in your accounts without requiring your pre-approval on an ongoing basis until you notify us in writing to switch or have placed restrictions on your account.

- Portfolio management—monitored at least annually as part of our standard service.

If you invest on a nondiscretionary basis, you make the ultimate decision regarding the purchase or sale of investments. Your accounts will not be monitored and you will receive trading support and client request services.

We also offer written financial plans and billable hourly financial services by engagement for non-investment management clients—our firm does not monitor your accounts.

For additional information about our advisory business, please see www.georgehiller.com for our Form ADV 2A brochure (Item 4 and 7).

**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 Fees, Costs, Conflicts and Standard of Conduct

What fees will I pay?

Our fees are debited quarterly in advance and are based on a percentage of the previous quarter's ending balance and are disclosed in our Form ADV Part 1A, Item 5.E. and more fully described in our Form ADV Part 2A brochure Item 5.

Please see www.georgehiller.com for a current copy of the Form ADV Part 2A Brochure.

There are other fees and costs related to our investment advisory services and investments in addition to the principal fees and costs listed above that you will pay directly or indirectly. Examples of our other fees are semiannual maintenance fees and account opening fees for 529 plan accounts. You will also directly or indirectly pay custodian fees, trading fees, mutual fund fees and other fees related to your specific investment.

For new clients the minimum account size is \$250,000.00. Multiple accounts may be aggregated to meet this minimum. The account minimum may be waived under certain circumstances at the discretion of the firm.

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.

For more detailed information about our fees and costs please review our Form ADV Part 2A brochure (specifically Item 5) which can be found at www.georgehillier.com.

** Ask your financial professional:*

– 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 examples to help you understand what this means.

Engagement of financial plan or billable hourly financial service will provide more compensation to your adviser. When you add funds to your investment account we will earn more in fees and when you withdraw funds from your account we will earn less in fees which gives us an incentive to encourage you to invest more money in your accounts.

** Ask your financial professional:*

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

Additional information:

For more detailed information about our conflicts of interest please review our Form ADV, Part 2A brochure (specifically Item 11 and 12) which can be found at www.georgehillier.com.

How do your financial professionals make money?

Our professionals are compensated based on the amount of assets they service and therefore earn higher compensation for investing more of your money.

Our professionals also receive compensation for financial plan engagements and hourly billable financial engagements.

Item 4 Disciplinary History

Do you or your financial professionals have legal or disciplinary history?

Our firm has no disciplinary history. Visit Investor.gov/CRS for a free and simple search tool to research our firm and our financial professionals.

** Ask your financial professional:*

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

Item 5 Additional Information

You can find additional information about our services and request a copy of the relationship summary by visiting www.georgehillier.com; emailing at ghiller@georgehillier.com or calling us at 404-365-0222.

** 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?

Summary of Material changes to FORM CRS 6/30/2020

ITEM 2 Relationships and Services

We have added "or have placed restrictions on your account." If you invest on a discretionary basis, our firm will buy and sell investments in your accounts without requiring your approval on an ongoing basis until you notify us in writing to switch or have placed restrictions on your account.

Item 3 Fees, Conflicts, and Standard of Conduct

We have corrected the heading from Standard of Conflict to Standard of Conduct. We have added "Please see www.georgehiller.com for a current copy of the Form ADV Part 2A Brochure."