

Reliant Consulting & Research, Inc.
ADV Part 3: Form CRS Customer Relationship Summary
July 10, 2021
INTRODUCTION

Reliant Consulting & Research, Inc. is registered with the Securities and Exchange Commission (SEC) as an investment adviser. Clients and prospective clients should be aware that services and fees differ between investment advisers and broker-dealers 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?

Description of Services. We offer investment advisory services to investors including individuals. Reliant Consulting & Research does not serve as a custodian or take possession of your assets. With your participation (non-discretionary authority), we will develop a recommended asset allocation and investment portfolio consisting of mutual funds; **you will be responsible for selecting a custodian and operating your investment accounts** including purchases and sales.

We will review your investment performance periodically (quarterly, semi-annually or yearly) and provide a periodic Investment Review which shows your asset allocation & performance of the mutual funds you use versus an appropriate index or benchmark.

Meeting our fiduciary responsibility involves knowing your specific financial needs and goals as well as understanding your risk tolerance. To accomplish this, our initial work with you involves financial planning including a review of your income and information regarding your assets and liabilities. The value of this preliminary planning is to document goals and objectives and establish benchmarks to measure progress.

As a fiduciary, we are bound by law to act in your best interest. Our firm provides investment services on a fee-for-service basis. We do not sell financial products that charge a commission resulting in additional costs.

Limited Investment Offerings: We do not primarily recommend one type of security to clients. We usually recommend mutual funds that may be suitable for each client relative to a client's specific goals & objectives. We are limited to recommend investment funds that are available through your custodian or broker-dealer.

Account & Fee Minimums: Reliant has a minimum fee of \$2,500. Additionally, Reliant requires a minimum client net worth of \$1 million.

More information on fees can be found here: <https://adviserinfo.sec.gov/firm/summary/114445>

Conversation Starter: *Given my financial situation, should I choose an investment advisory service? Why or why not? What is your relevant experience, including licenses, education, and other qualifications? What do these qualifications mean?*

WHAT FEES WILL I PAY?

Our fees are based on either a fixed retainer (mutually agreed scope and total cost), or variable fees based hourly services used on your behalf. The hourly rate is \$350. Fees are billed quarterly in arrears, meaning we bill you at the end of the three-month billing period (calendar quarter). A general fee schedule for investment management services is included in our Form ADV 2A (Item 5).

Reliant's fees are exclusive of brokerage commissions, transaction fees, custodial fees, exchange fees, SEC fees, transfer taxes, wire transfer, electronic fund fees, and other related costs and expenses which may be incurred by you as charged by custodians or brokers.

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.

Conversation starter: Help me understand how these fees and costs might affect my investments. If I give you \$100,000 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?

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:

- A potential conflict of interest would be that the more complex your financial situation the more time we will take and correspondingly the more an investor will pay in advisory fees. Therefore, we have an incentive to expend time on your behalf.

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

HOW DO YOUR FINANCIAL PROFESSIONALS MAKE MONEY?

Our employees are salaried. The financial success of the firm benefits all employees. No employee nor the firm receives commissions, gifts, or incentives for investments made in any client account.

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

No. You can visit [Invest.gov/CRS](https://www.invest.gov/CRS) for free and simple search tools to research us and our financial professionals.

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

ADDITIONAL INFORMATION

Investors can obtain additional information about our services by calling us at 877-855-8172 or request a copy of Form CRS from danc@reliant1.com.

Conversation starter: Who is my primary contact? Is he or she a representative of an investment adviser or a broker dealer? Who can I talk with if I have concerns about how this person is treating me?

Your primary contact is Daniel Clark, an employee of Reliant Consulting & Research, Inc., a Registered Investment Adviser. We are not a broker dealer. Daniel Clark can be reached at 877-855-8172