

Stratton Lamb Advisors LLC is registered with the Securities and Exchange Commission (SEC) as an investment adviser. This document gives you a summary of the types of services we provide and how you pay. Investment advisory services and fees and brokerage services and fees differ and it is important that you understand this difference. Free and simple tools are available to research firms at investor.gov/CRS which also provides educational materials about investment advisers, broker-dealers and investing.

What investment services and advice can you provide me?

We offer discretionary investment advisory services, which from us includes financial planning, tax planning and estate planning advice, to retail investors. *Discretionary* means that you allow us to buy and sell investments in your account without asking you in advance. If you are a new client, you must have at least \$1,000,000 for us to manage. We use equity securities listed on exchanges such as the NYSE or Nasdaq; corporate and government debt securities; mutual and exchange traded funds and other securities, including investments in private companies and limited partnerships. You may impose restrictions on how we invest your money; for example, you could prohibit the purchase of a specific company or establish a purchase dollar limit. We monitor all investment portfolios at least quarterly. We offer financial planning services which do not include investment management.

You can find additional information on the services we provide in our Form ADV, Part 2A Brochure available at investor.gov/CRS by selecting “Firm” and searching on our name.

Conversation Starters

Given my financial situation, should I choose an investment advisory service? Why or why not? How will you choose investments for me? What is your relevant experience, including your licenses, education and other qualifications? What do these qualifications mean?

What fees will I pay?

Our fee for discretionary investment management is based on a percentage of your assets under our management. It is not subject to negotiation. Our fee is invoiced to be paid quarterly in advance. You should know that the more assets you have under our management, the more you will pay us in fees which could give us an incentive to encourage you to increase the assets in your account. Our fee for financial planning is at an hourly rate.

You may pay other costs directly or indirectly in addition to our fee. These can include custodian and account maintenance fees, fees related to mutual and exchange traded funds and other transactional fees. If you invest in private equity or other outside managers, you will pay fees directly to these outside managers. These fees and costs are not in the fee you pay to us.

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. You can find more information about the fees you will pay to us in our Form ADV, Part 2A brochure available at investor.gov/CRS.

Conversation Starter

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 advisor?

How else does your firm make money and what conflicts of interest do you have?

When we act as your investment advisor, 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. One example to help you understand what that means is provided above under “What fees will I pay?”.

Conversation Starter

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

You can find more detailed information about our conflicts of interest in our Form ADV, Part 2A brochure available at investor.gov/CRS.

How do your financial professionals make money?

Our firm is comprised of the two principals who have equal interests in the firm. We make money solely from the fees we charge for discretionary investment management or financial planning services.

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

No.

You will find simple, free tools at investor.gov/CRS to research our firm and financial professionals.

Conversation Starter

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

For Additional Information

You can find additional and up-to-date information about our investment advisory services in our Form ADV, Part 2A brochure available at investor.gov/CRS. You can request up-to-date information and a copy of this relationship summary by contacting us at 617 269.4410.

Conversation Starters

Who is my primary contact person? Is she or he 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?