

Relationship Summary

April 29, 2020

Item 1. Introduction

View Capital RIA, LP ("View Capital") is an investment adviser registered with the Securities and Exchange Commission ("SEC"). There are other types of financial service professionals that provide different advisory services and fees and it is important that you understand the differences. This Form CRS will help you to understand the way View Capital RIA, LP can work with you and their fee structure. This Form also provides you "Conversation Starters" or considerations you may want to discuss with the financial professional. The SEC provides free educational materials about investment advisors, brokerage services and investing and offers simple tools to help you to research firms and financial professionals at www.investor.gov/CRS.

Item 2. Relationships and Services

What investment services and advice can you provide me?

View Capital provides investment advisory and financial planning services through its View Capital Advisory Program ("VCAP") and financial planning and investment consulting services through its View Capital Consulting Program ("VCCP") primarily to ultra-high net worth individuals and institutions. We seek to meet each client's financial objectives through the management of an investment portfolio that may include mutual funds, exchange-traded funds (also known as ETFs), third-party separate account managers, private funds that invest in a wide range of alternative investments and pooled investment vehicles managed or controlled by View Capital or its affiliate.

The frequency and nature of our wealth planning and investment management interactions with you will vary based on your needs, preferences and advisory services. Your client advisor reviews each of your accounts at least once per quarter as part of our standard services to ensure alignment with the stated strategy and your goals, and to implement any necessary changes. More frequent reviews may be triggered by factors such as changes in your investment objectives, cash flows in or out of an account, market fluctuations, or changes occurring with a particular asset manager.

We provide investment management services to you on either a discretionary or nondiscretionary basis, as you choose. We generally request new clients to open an account with a \$1,000,000 investment, however; lesser values may be accepted with management approval.

For more information regarding all of our services, read the accompanying Brochure starting on pages 4 and 12 (Items 4 and 7).

Conversation Starters

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 you these qualifications mean?

Item 3. Fees, Costs, Conflicts, and Standard of Conduct

What fees will I pay?

For VCAP services, our advisory fees are typically charged on a quarterly basis, in advance and are computed based on quarterly asset values. The actual billing rate varies depending on the asset levels, the investment objective, and complexity of the client's financial structure. Please note that a \$1,000.00 minimum annual fee applies to any advisory account. Typically, the more assets we manage for you, the more you will pay in fees, and therefore we have an incentive to encourage you to increase assets in your accounts. In addition, if you elect our financial planning services, we will mutually agree as to the specific scope of services and fees to be charged as reflected in the client agreement. For VCCP services, our advisory fees are charged on a quarterly basis, in advance and is either a fixed consulting fee or computed based on quarterly asset values.

The costs of operation and administration of your account, including custodian fees, mutual funds expense fees, transactional fees, and other related costs and expenses are exclusive of and in addition to the above fees paid to View Capital. View Capital does not typically invest client assets in pooled investment vehicles managed by View Capital, however, in such circumstances View Capital may or may not charge management fees associated with those investments. Factors that cause View Capital to charge a management fee on a pooled investment vehicle include additional expense necessary to manage and administer that investment strategy.

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. Read more about our fees on [page 9 \(Item 5\)](#) of the Brochure. Your specific fee schedule can be found in your investment management agreement.

Conversation Starters:

Help me understand how these fees and costs might affect my investments. If I give you \$1,000,000 to invest, now much will go to fees and costs, and how much will be invested for me?

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

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 could create conflicts of interest (as listed above). We may invest your assets in pooled investment vehicles controlled and advised by an affiliate of View Capital where we may or may not charge a management fee for your investments into such pooled investment vehicles.

Read more about our conflicts of interest and how we manage them in our Brochure on [page 12 \(Item 8\)](#).

How do your financial professionals make money?

Your financial professional receives total compensation consisting of a base salary and variable compensation. Total compensation takes into consideration competitive market compensations for the similar roles and expertise, as well as overall revenue, new assets growth, retained assets and contributions to our culture and business strength. Financial professionals that are partners also have an ownership interest in View Capital and receive a share of the firm's profits. Payment of variable compensation and firm profit creates a conflict of interest for your financial professional.

Item 4. Disciplinary History

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

View Capital has no legal or disciplinary history. One of the Firm's Client Advisors had legal issues associated with their employment prior to joining View Capital. Please refer to your Client Advisor's Form ADV Part 2B for more detail. Visit www.investor.gov/CRS for a free and simple search tool to learn more.

Conversation Starters:

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

Item 5. Additional Information

Read the accompanying Brochure before you invest with us. It contains important information about our advisory services. Call 214-855-2550 for up-to-date information about us and to request a copy of our Relationship Summary. You can also visit us at <https://www.view-cap.com/>.

Conversation Starters:

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?