

**Form ADV, Part 3 -- Client Relationship Summary (Form CRS) - March 2024**

<p><b>Item 1:</b> <b>Introduction</b></p>	<p>Trisperity Advisors is an investment adviser registered with the Securities and Exchange Commission. This document gives you a summary of the types of services and fees we offer. Free tools are available to research advisory firms at investor.gov/CRS, which also provides educational materials about broker-dealers, investment advisers and investing.</p>
<p><b>Item 2:</b> <b>Relationships and Services</b></p>	<p><i>What investment services and advice can you provide me?</i></p> <p>We offer financial planning and investment management to retail investors, including individuals, trusts, estates, charitable organizations and small businesses. Advice may include: determination of financial objectives, identification of financial problems, cash flow management, tax planning, insurance review, investment management, education funding, retirement planning, and estate planning.</p> <p>We review your account continuously and monitor cash balances and all actively traded securities held in your portfolio daily.</p> <p>We have discretionary authority to decide which securities to purchase and sell for your account and you may impose limits on our authority as to asset class, sector, industry, or individual security selections.</p> <p>We do not have a required minimum account size but reserve the right to set one.</p> <p><b>For additional information</b>, please see Form ADV, Part 2A brochure Items 4, 7, 8, 12, 13, and 16.</p> <p><b>Conversation Starters.</b> Ask your financial professional:</p> <ul style="list-style-type: none"> <li>• <i>Given my financial situation, should I choose an investment advisory service? Why or why not?</i></li> <li>• <i>How will you choose investments to recommend to me?</i></li> <li>• <i>What is your relevant experience, including licenses, education, and other qualifications? What do these qualifications mean?</i></li> </ul>
<p><b>Item 3:</b> <b>Fees, Costs, Conflicts and Standard of Conduct</b></p>	<p><i>What fees will I pay?</i></p> <p>Fees are computed as a percentage of the market value of assets under management as of the last day of each calendar quarter. Market value is based on trade date valuation and includes accrued interest. Fees for deposits or withdrawals made during the quarter are prorated from date of transaction. The rates on certain portfolios may be negotiable depending upon the size of the account and type of service. Fees for existing clients may be higher or lower than current posted rates. Fees are payable quarterly in advance.</p> <p>Our investment management services are continuous but may be terminated at any time by either party upon written notice. Fees paid in advance will be prorated to the date of termination and any unearned portion will be refunded upon client request.</p> <p>You may incur brokerage commissions, transaction fees, and administrative charges imposed by custodians and broker-dealers.</p> <p>We may use mutual funds or exchange-traded funds to fill specific portfolio needs.</p>

	<p>If we use these funds, you will incur the fund's management and administrative fees, plus our investment management fees.</p> <p>We do not charge performance-based fees.</p> <p>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.</p> <p><b>For additional information</b>, please see Form ADV, Part 2A brochure Items 5 and 6.</p> <p><b>Conversation Starters.</b> Ask your financial professional:</p> <ul style="list-style-type: none"> <li>• <i>Help me understand how these fees and costs might affect my investments?</i></li> <li>• <i>If I give you \$500,000 to invest, how much will go to fees and costs, and how much will be invested for me?</i></li> </ul> <p><b><i>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?</i></b></p> <p>As your investment adviser and fiduciary, we act in your best interests at all times. Our investment management fees are fully disclosed and competitive with other full-service investment advisers. We do not partake in commissions or invest in commission-based products such as mutual funds with sales loads, annuities, insurance policies, mortgages, etc.</p> <p><b>Conversation Starter.</b> Ask your financial professional:</p> <ul style="list-style-type: none"> <li>• <i>How might your conflicts of interest affect me, and how much will you address them?</i></li> </ul> <p><b><i>How do your financial professionals make money?</i></b></p> <p>Our financial professionals are paid salaries and have the opportunity to earn bonuses based on their contributions and profitability of the firm. We do not receive any commissions, in connection with providing investment advice to clients.</p>
<p><b>Item 4:</b> <b>Disciplinary History</b></p>	<p><b><i>Do your financial professionals have legal or disciplinary history?</i></b></p> <p>No. Trisperity has not been subject to any disciplinary events by regulators nor is it a party to any legal events that are material to client evaluation of our advisory business. Visit <a href="https://www.investor.gov/CRS">https://www.investor.gov/CRS</a> for a free, simple search tool to research us and our financial professionals.</p> <p><b>Conversation Starters.</b> Ask your financial professional:</p> <ul style="list-style-type: none"> <li>• <i>As a financial professional, do you have any disciplinary history?</i></li> <li>• <i>For what type of conduct?</i></li> </ul>
<p><b>Item 5:</b> <b>Additional Information</b></p>	<p>If you would like additional, up-to-date information, please call our office at 281-395-1021. For additional information on our advisory services, see our Brochure available at <a href="https://adviserinfo.sec.gov/firm/summary/142438">https://adviserinfo.sec.gov/firm/summary/142438</a>.</p> <p><b>Conversation Starters.</b> Ask your financial professional:</p> <ul style="list-style-type: none"> <li>• <i>Who is my primary contact person?</i></li> <li>• <i>Is he or she a representative of an investment-adviser or a broker-dealer?</i></li> <li>• <i>Who can I talk to if I have concerns about how his person is treating me?</i></li> <li>• <i>Who else can I talk to about my portfolio(s)?</i></li> </ul>