

RELATIONSHIP SUMMARY

JUNE 25, 2020

Capital Insight Partners, LLC (“We”, “Our”, “Us”) is an investment adviser registered with the Securities and Exchange Commission (“SEC”). Prior to investing it is important that you understand the differences between brokerage and investment advisory services and fees. The SEC-sponsored website www.investor.gov/CRS provides free and simple tools to research investment advisors, broker-dealers and investing. We encourage you to visit this website. This brochure provides a summary of the services we provide and how we are paid.

RELATIONSHIPS AND SERVICES

What investment services and advice can you provide me?

We offer the following investment advisory services to retail clients. When managing your portfolio we monitor it on an ongoing basis and exercise discretion when making investments. Generally we accept relationships over \$2,000,000.

- Wrap fee program-portfolio management with most transaction costs included in the fee,
- Financial planning-we help you put together a plan to meet your financial goals and objectives,
- Investment consulting-we provide advice on financial matters unrelated to portfolio management.

More detailed information about our services are available in our Form ADV Part 2A and Appendix 1 which can be found at www.adviserinfo.sec.gov/IAPD and entering our Firm CRD #147165.

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 these qualifications mean?

FEES, COSTS, CONFLICTS AND STANDARD OF CONDUCT

What fees will I pay?

Fees and costs affect the value of your portfolio over time and we encourage you to ask your Relationship Manager for personalized information on the fees and costs you will pay. We have three types of fees that are based on the service provided.

- **Wrap program fee**- the fee charged is a percentage of assets that we manage and billed quarterly in advance based on the value of your assets at the end of the previous calendar quarter. Since our fee revenue increases when we manage more of your assets we may have an incentive to recommend that you put more of your assets under our management. The fee includes most transaction costs and covers all the services listed above and is therefore higher than a typical asset-based advisory fee. In addition to the fee we charge you may incur additional fees imposed by the custodian holding your assets. If we use Exchange Traded Funds (ETF) or Mutual Funds in your portfolio you will also incur fees charged by the ETF or Fund, information about these fees can be found in the prospectus.
- **Hourly or flat fee arrangements**- when you don't need portfolio management but do need one of the other services we provide, such as financial planning or investment consulting.
- **Our fees vary and are negotiable.** Other firms may provide the same services at a lower fee.

- **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 \$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 some examples to help you understand what this means.

- Our portfolio management fee includes some transactions costs which reduces our revenue so we may have an incentive to avoid certain transactions,
- Our staff may own, purchase or sell, the same investments as our clients.

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

How do your financial professionals make money?

All of our financial professionals are paid a salary and are eligible for an annual bonus that is based on our profitability.

DISCIPLINARY HISTORY

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

No. We recommend that you go to www.investor.gov/CRS for a free and simple tool 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

For additional information and to request a copy of our Form CRS please visit our website at <https://www.capitalinsightpartners.com> or call us at 480-295-7100

Conversation Starter
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?