

Bolthouse Investments, LLC
Client Relationship Summary
March 27, 2025

Item 1: Introduction

Bolthouse Investments, LLC (our “firm”, “we”, “us”) is registered with the Securities and Exchange Commission as an Investment Advisor.

Brokerage and investment advisory services and fees differ, and it is important for the retail investor to understand the differences. Free and simple tools are available to research firms and financial professionals at [Investor.gov/CRS](https://www.investor.gov/CRS), which also provides educational materials about broker-dealers, investment advisers, and investing.

Item 2: Relationships and Services

What investment services and advice can you provide me?

Our firm offers investment management and consulting services to retail investors on both a discretionary and non-discretionary basis. If we are managing your account on a discretionary basis, we have the authority to buy and sell securities without your permission. If we are managing your account on a non-discretionary basis, we must obtain your permission prior to making a trade. You have the opportunity to place reasonable restrictions on the types of investments we make on your behalf. As part of our services, we will select third party advisors and mutual funds to make the investments in your account. We require you to have at least \$500,000 to open an account with us, however, we may accept lower amounts. We will monitor your account at a frequency you select.

FOR ADDITIONAL INFORMATION REGARDING OUR SERVICES, PLEASE SEE ITEMS 4, 7 AND 13 OF OUR [Form ADV Part 2A](#).

Ask us the following questions:

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?

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

What fees will I pay?

For our investment management services, you will pay a quarterly management fee based on your total assets under management. The more money you invest with us the more fees you will pay; therefore, we have an incentive to encourage you to increase your assets in your account. For our consulting services, you will pay an hourly rate that we will negotiate with you at the time of signing your contract with us. While we do not charge the following, you will also pay custodial fees to the broker-dealer that holds your assets, a transaction fee when we buy or sell an investment in your account and additional fees for the no-load mutual funds and exchange traded funds we have recommended for your account. If you are also invested in one of the private funds we manage, you will pay additional fees for servicing that fund, including audit and tax related expenses.

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.

FOR ADDITIONAL INFORMATION REGARDING OUR FEES, PLEASE SEE ITEM 5 OF OUR [Form ADV Part 2A](#).

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Ask us the following question:

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.

We manage two private funds that we may recommend you invest in. We have a financial incentive to recommend you invest in these funds which presents a conflict.

FOR ADDITIONAL INFORMATION REGARDING OUR CONFLICTS, PLEASE SEE ITEMS 10 AND 11 OF OUR Form ADV Part 2A.

Ask us the following question:

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

How do your financial professionals make money?

We pay our financial professionals a base salary and in some cases a bonus. We base the bonus on a multitude of factors, but do not take into consideration sales, retention, or profitability.

Item 4: Disciplinary History

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

No. Please visit [Investor.gov/CRS](https://www.investor.gov/crs), for a free and simple tool to research our firm and financial professionals.

Ask us the following question:

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

Item 5: Additional Information

For additional information regarding our fees, services, and conflicts, please see our [Form ADV Part 2A](#). Please contact us at **661-326-6357** for more up-to-date information or request a copy of this client relationship summary.

Ask us the following questions:

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?