



Customer Relationship Summary (Form CRS)

Introduction	Trinity Legacy Partners, LLC is registered with the Securities and Exchange Commission (SEC) as an investment adviser. We offer investment management and financial planning services. We are not a broker-dealer. Brokerage and investment advisory services and fees differ, and you need to understand the differences. Free and simple tools are available to research firms and financial professionals at www.investor.gov/CRS . This site also provides you with educational materials about broker-dealers, investment advisers, and investing.
Relationship Services	<p>What investment services and advice can you provide for me?</p> <p>We offer investment advisory and financial planning services to you based on the following types of agreements:</p> <p><u>Investment Management:</u> We review your financial situation and investment portfolio through interactions with you. We make use of portfolio rebalancing software to maintain your investment allocations according to a written investment objectives established for you. We do not require a minimum investment amount from you to establish an investment management relationship.</p> <p>We will have trading authority (discretionary authority) from you to determine which securities to be bought or sold in your portfolio, and in what amounts. Investments and accounts are reviewed by us quarterly or more frequently, depending on market conditions. We will have reviews with you, especially when there are changes in economic conditions and financial markets, new investment information, and/or changes in your financial or personal situation. For additional information, please reference our Form ADV Part 2A, Item 4 and Item 13.</p> <p><u>Investment Consulting:</u> We will consult with you regarding your assets held in employer-sponsored retirement plans, such as your 401(K) Plan.</p> <p><u>Financial Planning:</u> We will perform a financial planning analysis as agreed upon by you and for services listed in our Form ADV Part 2A Item 4.</p> <ul style="list-style-type: none"> 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	<p>What fees will I pay?</p> <p>For Investment Management services, we will charge those fees from your account every year, based on the amount of your assets that we manage for you. These annual fees are subject to our fee schedule that ranges between 0.60% and 1.50%. Fees are charged quarterly in advance based on the value in your account on the last business day of the prior quarter-end. The more assets there are in your account, the more you will pay in fees; thus, we may have an incentive to encourage you to increase the assets in your account.</p> <p>With written consent, if you want us to consult on your retirement plan held somewhere else (like your 401(K) Plan with your employer), we may charge you an annual Investment Consulting fee based on 0.25% of the balance of that plan, with a minimum fee of \$500. We also offer project consulting based</p>

	<p>on a \$250 hourly rate. Our Financial Planning fee ranges from \$2,500 to \$5,000 and our Financial Review fee is a \$1000 fixed fee.</p> <p>For your accounts that Charles Schwab maintains, Schwab generally does not charge you separately for custody services but is compensated by revenue earned on certain trades that it executes or that settle into your Schwab account. Most trades (for example, purchases or sells of stocks, mutual funds and ETFs) may not incur Schwab commissions or transaction fees. Schwab is also compensated by earning interest on the uninvested cash in your account in Schwab's Cash Features Program. Your accounts at Schwab benefit because the overall costs you pay are lower than they would be otherwise.</p> <p>Schwab will execute the trades for your account, and 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, please see our Form ADV Part 2A, Item 5 and Item 12.</p> <p>What are your legal obligations to me when acting as my investment adviser? When we act as your investment adviser, we must act in your best interest and not put our interest ahead of yours. At the same time, the way we make money creates some potential conflicts with your interests. You should understand and ask us about these conflicts.</p> <p>How else does your firm make money and what conflicts of interest do you have? We are a fee-only firm that is exclusively compensated by investment management and financial planning fees. We are affiliated with Trinity Legacy Dynamic Options Fund I, LP in which we receive compensation based on the performance of the Fund. Also, we pay My Financial Coach Planning LLC a referral fee, but only for client referrals they make to us for investment management services.</p> <p>How do your financial professionals make money? We are paid annual salaries and a discretionary bonus based on the profitability of the firm.</p> <ul style="list-style-type: none"> • 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? • How might your conflicts of interest affect me, and how will you address them?
Disciplinary History	<p>Do you or your financial professionals have a legal or disciplinary history?</p> <p>No. A free search tool to research us and our financial professionals is available at investor.gov/CRS</p> <ul style="list-style-type: none"> • As a financial professional, do you have any disciplinary history? For what type of conduct?
Additional Information	<p>Additional Information about our services is available by visiting www.trinitylegacy.com and to request a copy of the relationship summary, contact us by email at info@trinitylegacy.com or by telephone at 713-999-8053.</p> <ul style="list-style-type: none"> • 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?

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