



Form CRS - Client Relationship Summary
March 2025

Seven Canyons Advisors, LLC (“Seven Canyons”) is an investment advisor registered with the Securities and Exchange Commission. Brokerage and investment advisory services and fees differ, and it is important for you to understand these differences. Free and simple tools are available to research firms and financial professionals at www.investor.gov/CRS which also provides educational materials about investment advisers, broker-dealers and investing.

What investment services and advice can you provide me?

Seven Canyons offers portfolio management advisory services to retail investors on a discretionary basis for an ongoing fee based on the market value of the securities in your account. Through our portfolio management services, we can utilize individual stocks, ETFs, mutual funds and other securities. Our services are primarily “discretionary”— meaning we will make the ultimate investment decisions without your signoff. When we have discretionary authority, we will monitor the portfolio's performance on an ongoing basis and will make adjustments and reallocations as necessary.

For individually managed accounts we aim to have an account minimum of \$30,000,000 but Seven Canyons can choose to waive this minimum at its discretion.

Additional information about our advisory services is located in Item 4 of our Firm Brochure which is available online at <https://sevendcanyonsadvisors.com/>.

Conversation Starters:

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- 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 those qualifications mean?

What fees will I pay?

You will be charged an ongoing fee based on your advisory services and the amount of assets in your account, as stated in your fee schedule. Our fees vary and are negotiable based upon the services we provide. The fee structure for investment management is typically no greater than 1.5% of your assets managed by Seven Canyons.

Fees are typically payable quarterly in advance based on the most recent quarterly asset valuation and automatically deducted from your account by the third-party custodian with your consent. You may also choose to send the payment directly to us. The custodians that hold your assets can charge you a transaction fee for the purchase or sale of investments in your account and these fees are in addition to our advisory fee and paid solely to the custodian.

For client assets invested in mutual funds and ETFs, you may be charged certain expenses, commissions, and management fees from custodians, brokers, or other third parties that are separate from, and in addition to, our fee which will reduce the value of your investments over time. These fees are paid directly to the third-party and Seven Canyons will not receive any portion of those fees.

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.

Additional information about our fees is located in Item 5 of our Firm Brochure which is available online at <https://sevendcanyonsadvisors.com/>.

Conversation Starters:

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- Help me understand how these fees and costs will 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?



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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 affect the investment advice we provide you. Here are some examples to help you understand what this means.

We can make additional money by advising you to invest into other investment vehicles such as funds advised by Seven Canyons. We can potentially receive a higher fee on assets in those vehicles. Any recommendations to invest in those vehicles is provided only on a non-discretionary basis and requires your approval.

You should consider the fact that we can make additional money by recommending those vehicles to you.

Additional information about our conflicts of interest can be found in our Firm Brochure under Items 5 and 6 which is available online at <https://sevendcanyonsadvisors.com/>.

Conversation Starters:



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

How do your financial professionals make money?

Our financial professionals are employees of the firm. Employees are paid a fixed monthly salary and certain professionals may also receive a portion of the advisory fees the firm collects from the accounts these professionals manage. Employees may also be compensated based on fees collected from other investment vehicles, such as funds, managed by Seven Canyons.

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

No. Visit www.investor.gov/CRS for a free and simple search tool to research our firm and our financial professionals.

Conversation Starters:



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

Additional Information

You can find additional information about our firm's investment advisory services on the SEC's website at www.adviserinfo.sec.gov by searching CRD#: 290334. You may also contact our firm at (801) 349-2721 and talk to any one of our investment professionals or support staff.

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?