

GKB PARTNERS LLC

CUSTOMER RELATIONSHIP SUMMARY

INTRODUCTION:

GKB Partners, LLC (“GKB” or “we”) is registered with the Securities and Exchange Commission (SEC) as an investment adviser. 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 [Investor.gov/CRS](https://www.investor.gov/CRS), which also provides educational materials about broker-dealers, investment advisers, and investing.

WHAT INVESTMENT SERVICES AND ADVICE CAN YOU PROVIDE ME?

We offer investment advisory services mainly focused on private opportunities, on a non-discretionary basis. Investment objectives, guidelines, restrictions, terms and/or fees are tailored to the specific needs of the client. Such investment objectives, fee arrangements and terms have been and will be individually negotiated. The investment objectives and strategy of each client are set forth in the investment management or investment advisory agreement or similar agreement.

For additional information, please see Form ADV, Part 2A brochure (Items 4 and 7 of Part 2A) and other applicable documents.

Conversation Starters

Ask your financial professional—

- 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?

WHAT FEES WILL I PAY?

Clients will pay an agreed upon fixed financial advisory fee. The fees are charged and collected on a monthly basis in arrears. In addition, some clients will also pay GKB discretionary success fees and profit interests. You will pay fees and costs whether you make or lose money on your investments. Please make sure you understand what fees and costs you are paying.

For additional information, please see Form ADV, Part 2A brochure (Item 5) and other applicable documents.

Conversation Starter:

Ask your financial professional—

Help me understand how these fees and costs might affect my investments. If I want to invest \$10,000, 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 do 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 is an example to help you understand what this means.

- GKB does, from time to time, recommend or select other third-party investment advisers for our Advisory Clients. We do not receive direct or indirect compensation from such advisers, nor do we believe the investment in such funds creates a conflict of interest.

Conversation Starter:

Ask your financial professional—

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

For additional information, please see Form ADV, Part 2A brochure and other applicable documents.

HOW DO YOUR FINANCIAL PROFESSIONALS MAKE MONEY?

GKB's financial professionals are paid a cash salary and bonus based on the revenue the firm earns from financial advisory fees, success fees and profit interests.

DO YOU OR YOUR FINANCIAL PROFESSIONALS HAVE LEGAL OR DISCIPLINARY HISTORY?

No. Neither GKB nor any of its financial professionals have legal or disciplinary histories.

Visit [Investor.gov/CRS](https://www.investor.gov/crs) for a free and simple search tool to research us and our financial professionals.

Conversation Starter:

Ask your financial professional—

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

OTHER:

For additional information about our services, you can request an up-to-date copy of this relationship summary by calling 203-856-6852.

Conversation Starter:

Ask your financial professional—

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?