



Form CRS – Client Relationship Summary

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Introduction:

Seek First Inc (“Adviser”) is a registered investment adviser with the U.S. Securities and Exchange Commission (“SEC”). We offer personalized investment advisory services to individuals, families, and institutions. This document provides a brief overview of our services, fees, conflicts of interest, and other important information to help you make an informed decision about our firm and our services. **There are free and simple tools available to research firms and financial professionals at www.investor.gov/CRS which also provides educational materials about investment advisers, broker-dealers and investing.**

Relationships and Services:

What investment services and advice can you provide me?

Description of Services: Seek First Inc offers a range of investment advisory services tailored to meet your specific financial needs and goals. Our services may include the management of investment portfolios, financial planning, retirement planning, tax planning, and other related advisory services.

Monitoring: We monitor investments at least quarterly, and more frequently when there is an investment specific or market driven event that could impact investments. There are no material limitations on our monitoring services.

Investment Authority: We manage assets within managed accounts on a discretionary basis (executing securities transactions without having to obtain prior consent from you). However, you have the ability to revoke that authority.

Limited Investment Offerings: We do not offer any proprietary investment products.

Account Minimums and Other Requirements: The ideal fixed program client has a liquid net worth of \$1.5 million and complex planning and other needs. The Adviser typically requires a minimum of \$500,000 to establish a new advisory account. However, the minimum may be waived at the sole discretion of the Adviser. In addition, the Adviser may continue to service existing accounts that have values that are below the minimum. **Additional information about our advisory services is in Item 4 of our Firm Brochure which is available upon request or online at <https://adviserinfo.sec.gov/>.**

Fees, Costs, Conflicts, and Standard of Conduct

What fees will I pay?

Description of Principal Fees and Costs: The Adviser's fees are billed as a non-negotiable fixed rate basis. These fixed fees are typically based on the monthly hour commitment (calculated at the rate of \$225 an hour) we make to your planning services. You will receive a separate fee schedule outlining the specific fees for the services you will be receiving. Please review the fee schedule carefully to understand the charges applicable to your account.

Description of Other Fees and Costs: Client accounts may incur additional fees and charges, such as transaction costs, retirement plan administration fees, and other mutual fund annual expenses that are charged by broker-dealers, plan administrators or mutual fund companies that sell securities or provide additional services. These fees are in addition to and separate from advisory fees. ***Additional information about our advisory services is in Item 5 of our Firm Brochure***

Seek First Standard of Conduct

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.

Conflicts of Interest Involving Seek First Inc. Advisory Services

As an investment advisor, we have a fiduciary duty to act in your best interests. However, certain conflicts of interest may arise during the course of our business. These conflicts may include receiving compensation from third-party providers or affiliates for recommending their products or services. Rest assured that we will always prioritize your interests and disclose any potential conflicts that may impact our recommendations.

How do your financial professionals make money? Does Seek First Inc. Receive any Additional Compensation?

We do not receive any additional compensation, such as sales awards or bonuses, for recommending particular investment products or strategies.

Disciplinary History

Do you or your financial professionals have a legal or disciplinary history? No, we have had no reportable legal or disciplinary events involving our firm or its key personnel over the past ten years. ***Visit <https://Investor.gov/CRS> for a free and simple search tool to research our firm and our financial professionals.***

Additional Information

You can find additional information about our firm's investment advisory services on the SEC's website at <https://adviserinfo.sec.gov> by searching CRD #312546. You may also contact Seek First Inc. directly at (866) 398-4044 and talk to any one of our investment professionals or support staff.