

## Form ADV Part 3: Relationship Summary GreenPortfolio Inc.

### Introduction

GreenPortfolio Inc. ("GreenPortfolio" or "we") is an investment adviser registered with the U.S. Securities and Exchange Commission. We offer our clients investment advisory services. Clients should understand that our services and compensation are different than those of a broker-dealer, and it is important to understand these differences. Free tools are available to research firms and financial professionals at <https://www.investor.gov/CRS>.

### What Investment Services and Advice Can You Provide Me?

**Description of Services:** The following are descriptions of the primary services of GreenPortfolio which are available at <https://greenportfolio.com/> and <https://mygreenportfolio.com/>.

**Climate Scoring of Investment Portfolio** – Under this service, a client will utilize our interactive websites to assess common publicly traded securities for climate impact utilizing our algorithms. The data you provide to GreenPortfolio to perform a climate assessment may also be used by us to recommend third-party investment adviser(s). Please refer to Item 4 – *Advisory Business of our Form ADV Part 2A* for more details.

**Third-Party Investment Advisors** – Under this service, GreenPortfolio recommends one or more third-party investment advisers who can assist with your climate objectives based on your personal information. Our third-party investment adviser services are available only on our interactive website through our automated software and does not involve or include you working directly with our employees. You are never obligated or required to work with a third-party investment adviser firm recommended by GreenPortfolio. If you choose to engage a recommended third-party investment adviser, the third-party investment adviser is responsible for providing you the mutually agreed upon investment advisory services such as financial planning, making investment recommendations or decisions, continuously monitoring your accounts, and/or placing trades in your account when necessary. There will be resources on our interactive website for assisting you in making your decision to select an investment adviser. Through our website and follow-up email communications, we will invite you to schedule an introductory meeting with one or all of the third-party investment adviser(s) we recommend. Once you have selected a third-party investment adviser and enter your account information into our system, Climate Scoring of your investment portfolio holdings managed by the third-party investment manager will be performed on an ongoing basis. Additionally, on an ongoing basis, we will provide you an annual due diligence report about certain aspects of your third-party investment adviser. You may request at any time that we recommend an alternative investment adviser. Please refer to Item 4 – *Advisory Business of our Form ADV Part 2A* for more details.

**Limited Investment Offerings:** Other than scoring investment portfolios for climate purposes and recommending third-party investment adviser(s), GreenPortfolio does not provide advice on specific investments, types of investments, asset classes or investment strategies. Please refer to Item 8 – *Methods of Analysis, Investment Strategies and Risk of Loss of our Form ADV Part 2A* for more information.

**Account & Fee Minimums:** There are no minimum investment amounts or conditions required for our climate scoring program or our third-party investment adviser service. However, all clients are required to consent to our terms of services.

**Conversation Starters:** *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?

**Description of Principal Fees & Costs:** GreenPortfolio will not charge direct or indirect fees associated with the climate scoring of investment portfolios or when recommending third-party investment advisers. However, GreenPortfolio will receive a referral fee from the referred third-party investment adviser firm recommended by us and selected by you. The referral fee is a percentage of the investment advisory fee charged to you by the third-party investment adviser. For GreenPortfolio Inc.

Date of Form ADV Part 3: March 2025

additional details, a complete description of the third-party investment adviser's services, fee schedules and account minimums will be disclosed in the third-party investment adviser's disclosure brochure which will be provided to you prior to or at the time an agreement for services is executed and an account is established.

**Additional Information:** When working with a recommended third-party investment adviser, 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 more information about the fees that we receive and the other fees and expenses you will incur, please see **Item 5 of Form ADV Part 2A**.

**Conversation Starters:** *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?**

**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. When we recommend that you utilize a third-party investment advisor, we will receive a percentage of the fee which they collect from you. This creates a conflict of interest as we have an incentive to recommend managers who have such arrangements with us. We have a conflict of interest by only offering those third-party investment advisers that have agreed to pay a referral fee to us and have met the conditions of our review. There may be other third-party investment advisers that may be suitable for you that may be less costly.

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

**Additional Information:** For more information about our conflicts of interests and the ways we are compensated, please see **Item 4, Item 5** and **Item 10** of our **Form ADV Part 2A**.

**How Do Your Financial Professionals Make Money?**

**Description of Salary/Payment of IARs:** We compensate our investment adviser representatives with a flat salary not dependent on the level of revenue they generate for the firm. GreenPortfolio does not directly or indirectly compensate any person for client referrals. The only compensation received by us for our advisory services is the fees received from third-party investment advisers as described in **Item 5** of our **Form ADV Part 2A**.

**Additional Information:** GreenPortfolio receives no other form of compensation in connection with providing investment advice. Please see **Item 5, Fees and Compensation, Item 10, Other Financial Industry Activities and Affiliations** and **Item 12, Brokerage Practices** of our **Form ADV Part 2A** for additional discussion concerning other compensation.

**Do You or Your Financial Professionals Have Legal or Disciplinary History?**

No. Neither us, nor our investment adviser representatives have a legal or disciplinary history to report. You can look up more information about us and our investment adviser representatives at <https://www.investor.gov/CRS>.

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

**Additional Information About GreenPortfolio**

Additional information about us, our **Form ADV Part 2A** disclosure brochure and this relationship summary are available at <https://greenportfolio.com/>. You can find other information about us at <https://adviserinfo.sec.gov/firm/summary/330597>. You can find answers to our Conversation Starters at <https://greenportfolio.com/legal/>.

**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?*