

**AGMAN CAPITAL, LLC**  
**Client Relationship Summary**  
**Dated: February 14, 2025**

Agman Capital, LLC (“Agman Capital”) is registered with the United States Securities and Exchange Commission as a Registered Investment Adviser. Brokerage and investment advisory services and fees differ and it is important for the retail investor to understand the differences.

Free and simple tools are available to research firms and financial professionals at 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 to a family office. These services include wealth preservation, investment management, succession planning strategies, family governance and rising generation education, family office structuring and design, legacy planning and philanthropy.

The underlying securities within our portfolios are regularly monitored. Accounts are reviewed quarterly at a minimum and will typically be reviewed much more frequently on an ad-hoc basis. This is part of our standard service.

Our services are provided on a discretionary basis. Prior to engaging Agman Capital to provide investment advisory services, clients enter into a written agreement with the firm that sets forth the scope of our discretion, including the ability to buy and sell securities without first requesting your consent.

We do not make available or offer advice only with respect to proprietary products or a limited menu of products or types of investments.

As a general rule, we require a minimum account size of \$1,000,000. We may waive or increase account minimums at our sole discretion.

For additional information, we suggest you review our Form ADV 2A, specifically Items 4 and 7, available here: <https://adviserinfo.sec.gov/firm/334799>

#### ***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?*

For our services, you will pay us an annual management fee, paid quarterly, in advance, based on the value of your assets under management as of the beginning of the quarter. In addition to this quarterly fee, we charge a performance-based fee of 15% of the account percentage change above the monthly average of the 10 Year Treasury Yield. This fee is calculated at year-end. 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.

A conflict of interest exists in that the more assets you have in an account, the more you will pay us in fees. Therefore, we may have an incentive to encourage you to increase the assets in your accounts.

You will pay additional fees to the custodian of your assets such as for legal transfers of securities, wiring fees, or trading costs. Information about those fees is discussed in your custodial agreement.

For more detailed information, please review Form ADV 2A, specifically Item 5, available here:

<https://adviserinfo.sec.gov/firm/334799>

**Ask your financial professional:**

- *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?***

**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.

Because our advisory representative may engage in transactions that are substantially the same as those made for client accounts, we have a conflict of interest in that there is a potential for the advisory representative to benefit from short-term market results of the transactions executed for clients.

**Ask your financial professional:**

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

For more information about our conflicts of interest, please review our Form ADV Part 2A, available here:

<https://adviserinfo.sec.gov/firm/334799>

***How do your financial professionals make money?***

Our investment adviser representative receives regular distributions from the company and shares in the profits of the business.

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

No. Please visit [Investor.gov/CRS](http://Investor.gov/CRS) for a free and simple search tool to research our firm and our financial professionals.

**Ask your financial professional:**

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

You may request additional information about our firm and its services by contacting us at 574-607-7329.

Information about us is found both in our Form ADV Part 2A as well as the Client Relationship Summary, both of which are available at 574-607-7329 or online at <https://adviserinfo.sec.gov/firm/334799>

**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?*