

Item 1: Introduction

Emery Partners LLC is an investment advisor registered with the Securities and Exchange Commission. We feel that it is important for you to understand how advisory and brokerage services and fees differ in order to determine which type of account is right for you. There are free and simple tools available to research firms and financial professionals at <http://www.investor.gov/CRS> which also provides educational materials about investment advisors, broker-dealers, and investing.

Item 2: Relationships and Services

What investment services and advice can you provide me? Emery provides discretionary investment advisory services to high net-worth investors, institutional investors and other RIAs (“clients”). We provide individually tailored portfolios with an emphasis on alternative investment and private markets strategies on a discretionary basis. Our services include, but are not limited to, consulting, sourcing, diligence, structuring, investing, monitoring, and monetizing assets on behalf of private investors. We will recommend a portfolio of investments, or an individual investment(s) that is/are regularly monitored, and if necessary, updated to meet your changing needs, stated goals, and objectives. We also offer consulting services regarding business plans and private fund research and due diligence. We generally report to you at least quarterly on the performance of your investments.

Questions to Ask Us: *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?*

**Additional information about our advisory services is located in Item 4, 7 and 8 of
our Form ADV 2A brochure, found here:**

<https://adviserinfo.sec.gov/firm/summary/336787>

Item 3: Fees, Costs, Conflicts, and Standard of Conduct

What fees will I pay? We charge management fees and performance fees to investors based on assets under management for our advisory services. Management fees are paid quarterly. Generally, annual management fee rates range between 0.00-1.00%. Performance fees are payments made to us for generating positive returns on investments, typically above a hurdle rate, which are calculated as a defined percentage of the profits your account has achieved. Performance fees generally range between 0-20%. In addition, we offer consulting services for a fixed or monthly fee depending on the nature and complexity of the client’s situation. All fees are agreed upon with each client at the onset of the relationship. Our fees may vary, may be negotiable, and can be customized depending on the size, structure, and value of your account. In most cases, the fees and the costs will be automatically deducted from your account.

Third-Party Costs: In addition to our fees, you may pay other fees including: trading expenses, brokerage commissions, custodial fees, bank service fees, administration fees, accounting fees, and legal 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.

Questions to Ask Us: *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?

Additional information about our fees is located in Item 5 and Item 6 of our Form ADV 2A brochure, found here: <https://adviserinfo.sec.gov/firm/summary/336787>.

Conflicts of Interest: 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 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:

- We may have a conflict of interest in rendering advice to you because the financial benefit from managing another client is greater (e.g. such account generates higher fees), which may provide an incentive to favor the other account.

Questions to Ask Us: *How else does your firm make money and what conflicts of interest do you have? How might your conflicts of interest affect me, and how will you address them?*

Additional information about our services, you can refer to Item 10 of our Form ADV 2A brochure, found here: <https://adviserinfo.sec.gov/firm/summary/336787>.

How do your financial professionals make money? Primarily, we and our financial professionals receive cash compensation from the advisory services we provide to you. This compensation may vary based on different factors, such as those listed above in Item 3.

Item 4: Disciplinary History

Do you or your financial professionals have legal or disciplinary history? We do not have legal and disciplinary history. Visit <http://www.investor.gov/CRS> for a free and simple search tool to research our firm and our financial professionals.

Questions to Ask Us: *As a financial professional, do you have any disciplinary history? For what type of conduct?*

Item 5: Additional Information

You can find additional information about our firm's investment advisory services, see: <https://adviserinfo.sec.gov/firm/summary/336787>. You may also contact our firm at (617) 762-0090 or ir@emerypartnersllc.com.

Questions to Ask Us: *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?*