

## **Form ADV, Part 3- Form CRS August 2025**

### **Cane Capital Partners, LLC**

This Form CRS provides information about the qualifications and business practices of Cane Capital Partners, LLC (“CCP”). If you have any questions about the contents of this brochure, contact CCP at (281) 608-1137. CCP has applied for registration with the US Securities and Exchange Commission (“SEC”) ([www.sec.gov](http://www.sec.gov)) as an Investment Adviser. Brokerage and investment advisory services and fees differ. It is important to understand the differences. There are free tools available for investors to research firms and financial professionals at [www.Investor.gov/CRS](http://www.Investor.gov/CRS). This site also provides educational materials about broker-dealers, investment advisers, and investing. Additional information about CCP is available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov). The searchable IARD/CRD number for CCP is 337468.

### **Relationships and Services**

#### **What investment services and advice can you provide me?**

Our firm primarily offers the following investment advisory services to retail clients: investment management (we buy and sell positions in your portfolio); portfolio management (we review your portfolio, investment strategy, and investments); financial planning (we assess your financial situation and provide advice to meet your goals); solicitor/selection of other advisers (we select a third party adviser for you to use). As part of our standard services, we typically monitor client accounts on a daily basis. Our firm has discretionary management without any material limitations. We do *not* limit the types of investments that we recommend. Our firm does *not* have a minimum account size. Please also see our Form ADV Part 2A (“[Brochure](#)”), specifically Items 4 & 7.

**Recommended questions to ask your investment adviser:** *“Given my financial situation, should I choose an investment advisory service? Why or why not?”; “How will you choose investments to recommend to me?” and “What is your relevant experience, including your licenses, education and other qualifications? What do these qualifications mean?”*

### **Fees, Costs, Conflicts, and Standard of Conduct**

#### **What fees will I pay?**

Our fees vary depending on the services you receive. For our investment supervisory service, you will pay an annual fee between .75% and 1.50% dependent on AUM. Additionally, the more assets there are in a retail investor’s advisory account, the more a retail investor will pay in fees, and the firm may therefore have an incentive to encourage the retailer to increase the assets in his or her account. Fees are paid monthly in advance. Portfolio management fees are paid monthly in advance. FEES ARE NEGOTIABLE. You pay our fees even if you do not have any transactions and the advisory fee paid to us generally does not vary based on the type of investments selected. Please also see Items 4, 5, 6, 7 & 8 of our [Brochure](#).

**Third Party Costs:** Some investments (e.g., mutual funds, variable annuities, etc.) impose additional fees (e.g., transactional fees and product-level fees) that reduce the value of your investment over time. You will also pay fees to a custodian that will hold your assets.

Additionally, you will typically pay transaction fees when we buy and sell an investment for your account. *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.* Please also see our [Brochure](#) for additional details.

**Recommended question to ask your investment adviser:** *“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?”*

## Form ADV, Part 3- Form CRS

August 2025

### **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.

Some firms earn incentives for using proprietary products in client accounts and some firms trade investments from their own inventory with their clients. We do not engage in these activities. When you are charged an asset-based fee, the more assets you have, the more you will pay in fees. It is to CCP's benefit when managed assets are increased. If you rollover an IRA account to our firm, we will charge your account and make money. For more detailed information regarding conflicts of interest, please see our [Brochure](#), specifically Items 5, 10, 12, and 14.

Recommended question to ask your investment adviser: *"How might your conflicts of interest affect me, and how will you address them?"*

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

Primarily, we and our financial professionals benefit from the advisory services we provide to you because of the advisory fees we receive from you. This compensation may vary based on different factors, such as those listed above in this Item. Please also see Item 10 of our [Brochure](#) for additional details.

### **Disciplinary History**

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

Yes, an Investment Advisor Representative of CCP does have legal or disciplinary history to report. Please see [Investor.gov/CRS](https://www.investor.gov/crs) for a free search tool to research CCP and our financial professionals.

Recommended question to ask your investment adviser: *"As a financial professional, do you have any disciplinary history? For what type of conduct?"*

### **Additional Information**

Additional information about CCP is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov). The searchable IARD/CRD number for CCP is 337468. To request up to date information and a copy of your relationship summary, you can reach us at (281) 608-1137.

Recommended question to ask your investment adviser: *"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?"*