

FORM CRS - CUSTOMER RELATIONSHIP SUMMARY NOVEMBER 2025

INTRODUCTION

Our firm, 71 West Capital Partners, LLC DBA “71 West Capital Partners”, is an investment adviser registered with the Securities and Exchange Commission. 71 West feels 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 www.investor.gov/CRS, which also provides educational materials about investment advisers, broker-dealers, and investing.

WHAT SERVICES AND ADVICE CAN YOU PROVIDE ME?

71 West is a registered investment adviser that offers investment advisory services, including Wrap Comprehensive Portfolio Management, to clients. If you open an advisory account with 71 West, we will meet with you to understand your current financial situation, existing resources, objectives and risk tolerance. Based on what we learn, we will recommend a portfolio of investments that is monitored and rebalanced regularly to meet your changing needs and goals.

71 West manages accounts on a discretionary basis. After you sign an agreement with our firm, we are allowed to buy and sell investments in your account without asking you in advance. Any limitations will be described in the signed advisory agreement. We will have discretion until the advisory agreement is terminated by you or our firm.

We do not restrict our advice to limited types of products or investments.

71 West does not impose requirements for opening and maintaining accounts or otherwise engaging us.

Financial Planning & Consulting is included in our Wrap Comprehensive Portfolio Management services for no additional fee.

Additional Information about our advisory services is in Item 4 of our Wrap Brochure, which is available online at <https://adviserinfo.sec.gov/firm/summary/338756>.

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?

WHAT FEES WILL I PAY?

You will be charged an ongoing annual fee applied monthly based on the blend and value of the assets in your account. Our Wrap Comprehensive Portfolio Management fee ranges from 0.30% to 1.00%, and will be a blended fee billed at different rates against each asset class comprising your overall assets under management. Additionally, the more assets you have in your account, the more you will pay us. We therefore have an incentive to increase the assets in your account in order to increase our fees. Our fees vary and are negotiable. The amount you pay will depend upon your portfolio value and your asset allocation. 71 West’s fees will be automatically deducted from your advisory account, which will reduce the value of your advisory account.

71 West has negotiated with our chosen custodian, Pershing Advisor Solutions LLC, to eliminate transaction fees for all exchange traded funds (“ETF”) and U.S. listed equities. As a result, transaction fees are similar, or less, for investing in the same securities as they would be with other major institutional custodians. 71 West absorbs any remaining PAS transaction fees and asset class/strategy fees charged to you through our Wrap Comprehensive Portfolio Management services.

You may also pay charges imposed by the custodian holding your accounts for certain investments and maintaining your account. Some investments, such as mutual funds and index funds, charge additional fees that will reduce the value of your investments over time. ETF sponsors have discretion to increase or decrease their fee, which could impact the return of your investments over time.

In certain cases, we select third party money managers, sub-advisers, and/or separate account managers to assist us with managing your account. If selected, they will charge you a fee, which will be described in their Form ADV and/or agreement.

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 that you ask questions to understand all fees and costs you are paying.

Additional information about our fees is in Item 4 of our Wrap Brochure, which is available online at <https://adviserinfo.sec.gov/firm/summary/338756>.

Questions to Ask Us:

- Help me understand how fees and costs may affect my investments. If I give you \$10,000,000 to invest, how will my fees be calculated?

WHAT ARE YOUR LEGAL OBLIGATIONS TO ME WHEN ACTING AS MY INVESTMENT ADVISER? HOW DOES YOUR FIRM MAKE MONEY AND ARE THERE ANY CONFLICTS OF INTEREST BETWEEN CLIENT AND 71 WEST?

When 71 West acts as your investment adviser, we are required to always act in your best interests and not put our interests 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:

Since our fees are earned based on a percentage of the assets and the blend of asset classes that we manage for you, we have an incentive to increase the amount of assets that we manage for you.

Additional information about our conflicts of interest is in Item 9 of our Wrap Brochure, which is available online at <https://adviserinfo.sec.gov/firm/summary/338756>.

Questions to Ask Us:

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

HOW DO YOUR FINANCIAL PROFESSIONALS MAKE MONEY?

Our financial professionals are compensated based on the revenue our firm earns from their advisory services, client management and the time and complexity required to meet our clients' needs.

Our firm receives transition assistance from PAS in the form of hard dollars which are permitted to be used for research, firm infrastructure and brokerage services on behalf of our clients. This transition assistance allows us to absorb such costs for research and brokerage services, thus permitting us to maintain our cost structure for clients and not pass along increased expenses.

DO YOU OR YOUR FINANCIAL PROFESSIONALS HAVE LEGAL OR DISCIPLINARY HISTORY?

No, our firm and financial professionals do not have any legal or disciplinary history to disclose. Visit Investor.gov/CRS for a free and simple tool to research our firm and financial professionals.

Questions to Ask Us:

- As a financial professional, do you have any disciplinary history? If so, for what type of conduct?

ADDITIONAL INFORMATION

You can find additional information about our firm's investment advisory services on the SEC's website at www.adviserinfo.sec.gov by searching CRD #338756. You may also contact our firm at 617-885-8090 to request a copy of this relationship summary and other up-to-date information.

Questions to Ask Us:

- Who is my primary contact person? Who can I talk to if I have concerns about how this person is treating me?