

Lanmar Capital Management

Client Relationship Summary – October 2025

Lanmar Capital Management is an investment adviser registered with the U.S. Securities and Exchange Commission. Investment advisory and brokerage services and fees differ; therefore, it is important for you to understand the differences.

Free and simple tools are available to research firms and financial professionals at [Investor.gov/CRS](https://investor.gov/CRS), which also provides educational materials about investment advisers, broker-dealers, and investing.

What investment services and advice can you provide me?

We offer investment advisory services to retail investors. As part of our standard investment advisory services, we monitor our clients' portfolio holdings and the overall asset allocation strategy on an annual basis, or when market conditions or other triggers would warrant a review. Triggers include a change of investment objectives, a change in employment, or a change in recommended asset allocation weightings. Our investment strategy seeks to capture dominant trends and major inflection points largely based on the CANSLIM methodology, which is a system for selecting growth stocks by employing a combination of fundamental and technical analysis techniques, combined with our proprietary blend of entry criteria to capture asymmetric opportunities. Our strategy focuses on stocks with winning characteristics, known as the "95% Club." Our strategy may also take advantage of investments in options, futures, the use of margin, and short selling.

We offer our investment management services on a discretionary basis. Discretionary asset management allows us the limited authority to buy and sell investments in your account without asking you each time a transaction is placed. Our level of authority is determined at the beginning of our relationship with you in our advisory agreement, but can be changed upon request.

We provide investment recommendations and construct portfolios using a wide array of securities types to meet the investment objectives of clients. We require that our clients meet the definition of a "Qualified Client" by investing either \$1.1 million with us or that they have a net worth of at least \$2.2 million. Our cumulative minimum account requirement is \$100,000.

For additional information, please see our Form ADV Part 2A (with special emphasis on Items 4, 7, 8, and 16), which can be found on the SEC website at adviserinfo.sec.gov (CRD #338848).

Conversation Starters – Ask Your Financial Professional:

Given my financial situation, should I choose investment advisory services? 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?

Principal Fees: Qualified Clients will pay a performance-based fee of 20% of the gains in the account, calculated quarterly and subject to a hurdle rate and a high water mark. The hurdle rate will be equal to the performance of an agreed-upon benchmark. The performance fee will only be charged at the end of the quarter to the extent that there are cumulative gains in the account during the quarter. Furthermore, the high water mark is subject to a perpetual look-back, meaning the account must grow more than its initial invested principal. The performance fee will be calculated at the end of each quarter and directly deducted from the account by the qualified custodian. Lanmar Capital Management's fees are negotiable based at the firm's discretion.

Other Fees and Costs: Lanmar Capital Management's fees are exclusive of brokerage commissions, transaction fees, and other related costs and expenses which shall be incurred by the client. You may incur certain charges imposed by custodians, brokers, custodial fees, odd-lot differentials, transfer taxes, wire transfer and electronic fund fees, and other fees and taxes on brokerage accounts and securities transactions.

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Additional Information: You will pay fees and costs whether you make or lose money on your investments. Fees and costs will reduce the amount of money you make on your investments over time. Please make sure you understand what fees and costs you are paying. **More detailed information about our fees and costs are included in our Form ADV Part 2A (Item 5).**

Conversation Starter – 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 is an example to help you understand what this means.

Lanmar Capital Management’s Investment Advisor Representatives may trade for their own accounts securities that are being traded for client accounts at or about the same time. To mitigate the conflict of interest in such circumstances, Lanmar Capital Management’s policy is to require the trading of all relevant client accounts prior to the trading of their own accounts. The Chief Compliance Officer examines personal trading activities of Lanmar Capital Management’s personnel to verify compliance with this policy. **These arrangements and additional information about other conflicts of interest are discussed in more detail in our Form ADV Part 2A.**

Conversation Starter – Ask Your Financial Professional:

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

How do your financial professionals make money?

Our Investment Advisor Representatives are compensated through the receipt of a portion of revenue we receive for the advisory services we provide. The portion paid to your Investment Advisor Representative generally does not vary based on the type of investments that are recommended.

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

No. We invite you to visit Investor.gov/CRS for a free and simple search tool to research our firm and financial professionals.

Conversation Starter – Ask Your Financial Professional:

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

We encourage you to seek out additional information about our investment advisory services in our Form ADV Brochure on Investor.gov or adviserinfo.sec.gov (CRD #338848). Alternatively, you can call us at 347-409-1302 to speak with us directly to request up-to-date information and request a copy of the relationship summary.

Conversation Starters – 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?