

Sagewood Capital Management LLC
FORM CRS – CUSTOMER RELATIONSHIP SUMMARY

December 4, 2025

Item 1. <u>Introduction</u>	Sagewood Capital Management LLC is registered with the Securities and Exchange Commission (SEC) as an investment adviser. Brokerage and investment advisory services and fees differ, and it is important for you to understand these 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.
Item 2. <u>Relationships and Services</u>	What investment services and advice can you provide me? We offer investment advisory services to retail investors (individuals, family foundations and trusts), consisting of multiple strategies focused on delivering long-term value across a range of market environments. Our team has extensive investment experience in managing absolute return, customizable and tax-aware strategies across equities, fixed income, and derivatives. Monitoring As a part of our standard services we monitor and advise on clients’ investment portfolio on an ongoing basis. We regularly monitor our investment guidelines, and we also monitor the clients’ collateral for custodians that provide the appropriate data daily. Investment Authority Our clients typically grant us ongoing discretionary authority to manage their accounts, which means that we can buy and sell investments on behalf of our clients without seeking permission on a trade by trade basis. Limited Investment Offering Our team has extensive investment experience in managing absolute return, customizable and tax-aware strategies across equities, fixed income, and derivatives. Account Minimums and Other Requirements We accept clients with a minimum mandate of \$2.5 million. More information about our services is available on Part 2 of our Form ADV, which is available at https://adviserinfo.sec.gov/firm/summary/281548. Conversation Starters. 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?
Item 3.A <u>Fees, Costs, Conflicts, and Standard of Conduct</u>	What fees will I pay? We charge clients an investment management fee that is based on the value of each client’s assets under management. Fees are negotiable and range between 0.40% and 2.00% annually, depending on the size and complexity of each client’s accounts. Fees are charged quarterly, based on account values during each quarter. Our firm’s fees generally increase as client accounts grow, so we have an incentive to encourage our clients to increase the amount of assets in the accounts that are under our management. Certain accounts are also charged a performance fee. The performance fee schedule, if applicable, is up to 20% of the cumulative net gains in the account as of the last day of each calendar year, subject to a high water mark. Additional information about our firm’s fees are included in Item 5 of Part 2 of Form ADV, available at https://adviserinfo.sec.gov/firm/summary/281548. In addition to our investment management fee, clients bear transaction fees when we buy or sell investments. Clients also pay fees to the broker-dealer or bank that maintains each account (called “custody” fees) and they may pay margin interest charged by the custodian. We also manage certain accounts through a “wrap-fee sponsor”. These accounts pay additional fees directly to the plan sponsor in addition to the fees paid to Sagewood. Additional information on these fees is available from the plan sponsor.

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	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. Conversation Starter. Ask your financial professional— • Help me understand how these fees and costs might affect my investments. If I give you \$2.5 million to invest, how much will go to fees and costs, and how much will be invested for me?
Item 3.B <u>Fees, Costs, Conflicts, and Standard of Conduct</u>	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 to you. Here are some examples to help you understand what this means. • We manage accounts for multiple clients, and we allocate our time based on each client’s needs. Our firm earns more as we expand our client base and grow our assets under management, and we seek to balance our staffing with the individualized needs of each client. • Certain clients pay a performance-based fee in addition to the management fee for advisory services, which may create an incentive for us to make investments that are more risky than might be the case in the absence of a fee based on performance. Managing accounts that pay a performance-based fee alongside accounts that do not, or managing accounts with different performance-based fees, may also create a conflict for us in favoring certain accounts. Conversation Starter. Ask your financial professional— • How might your conflicts of interest affect me, and how will you address them? More Additional information about conflicts of interest between us and our clients is available on Part 2 of our Form ADV, which is available at https://adviserinfo.sec.gov/firm/summary/281548 How do your financial professionals make money? Our financial professionals receive a salary and may receive a discretionary bonus. Compensation is set with the intention of attracting and retaining highly qualified professionals.
Item 4. <u>Disciplinary History</u>	Do you or your financial professionals have legal or disciplinary history? Yes ☐ No ☒ Visit Investor.gov/CRS for a free and simple search tool to research us and our financial professionals. Conversation Starter. Ask your financial professional— • As a financial professional, do you have any disciplinary history? For what type of conduct?
Item 5. <u>Additional Information</u>	Additional information about our services can be found at https://adviserinfo.sec.gov/firm/summary/281548. If you have any questions about the contents of this brochure or would like to request a copy of this relationship summary, please contact David Travis at 212-231-8777. Conversation Starter. 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?