



iAdvise Partners
Form ADV Part 3 – CRS (Customer Relationship Summary)
March 2023

Item 1: Introduction

iAdvise Partners (“we” or “the Adviser”) is registered with the Securities and Exchange Commission (“SEC”) as an investment adviser.

It is important for you to understand the difference in fees and services between brokerage firms and investment advisers. Free and simple tools are available to research firms and financial professionals at [Investor.gov/CRS](https://www.investor.gov/CRS), which also provides educational materials about broker-dealers, investment advisers, and investing. Please ask us for more information.

Item 2: Relationships and Services

What investment services and advice can you provide me? We offer investment advisory and asset allocation to individuals and corporations. Investment advisory services are provided through discretionary and non-discretionary programs in accordance with your investment objectives pursuant to an Investment Advisory Agreement (“IAA”). Our investment advisory activities focus on investments in various kinds of assets and securities in a variety of markets that are intended to fit within your objectives, strategies and risk profile as described by you. We work with you to identify your investment goals and objectives, as well as risk tolerance, in order to create a portfolio allocation strategy designed to complement your financial situation and personal circumstances. Both discretionary separately managed accounts and non-discretionary accounts are customized for you to fit within your objectives, strategies and risk profile as described by each client. Non-discretionary basis means that you make the ultimate decision regarding the purchase or sale of investments recommended by us. We also offer family office services which include, but are not limited to furnishing advice to clients on matters not involving securities, such as financial planning matters, retirement planning, real estate planning, trust services that often include estate planning and educational services. We ordinarily require each account to have a minimum of \$5,000,000, although smaller amounts may be accepted and maintained at our discretion. Accounts are typically reviewed by the Chief Compliance Officer on a quarterly basis or as needed due to market conditions or transactional activity. The Chief Compliance Officer typically reviews daily transactions entered into for investment advisory clients to determine that correct entries have been made for all client records. *Please see Form ADV Part 2A (Brochure) Items 4, 7 and 13 for more detailed information.*

Conversation Starters Ask your financial professional

- **Given my financial situation, should I choose an investment advisory service?**
- **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: Fees, Costs, Conflicts and Standard of Conduct

What fees will I pay? We receive compensation as established in your written agreement with us. Generally, and pursuant to our contract, fees for the management of accounts will be based upon a percentage of the total assets in the account. Our annual advisory fees are typically between 0.75% and 1.25% of the net asset value of your account. The Adviser can also enter into fixed or flat fee arrangements pertaining to family office services provided. All fees are negotiable. Advisory fees are billed directly to you. You can pay us directly upon receipt of our invoice or you can pre-authorize your custodians to automatically deduct the fees from your account and make payment to us, on a monthly or quarterly basis, depending on your arrangement with us. We may also, from time to time, accept performance-based fees or other fees based on a share of capital gains on or capital appreciation of the assets of a client. Additionally, you will incur and be responsible for certain charges imposed by custodians, brokers, third party investment advisers and other third parties such as fees charged by managers, deferred sales charges, odd-lot differentials, transfer taxes, wire transfer and electronic fund fees, and other fees and taxes on brokerage accounts and securities transactions, if applicable given the nature of the transaction. The more assets you have in the advisory account, including cash, the more you will pay us. We therefore have an incentive to increase the assets in your account in order to increase our fees. You pay fees and costs whether you make or lose money on your investments. 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 see Form ADV Part 2A (Brochure) Item 5 for more detailed information.*

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Conversation Starters 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 may create some conflicts with your interests. You should understand and ask us about these conflicts because they affect the recommendations, we provide you. Here are some examples to help you understand what this means: if performance fees are charged for your account based on your agreement with us, those fees can potentially incentivize us to make more speculative investments than would be the case in the absence of such performance fee arrangement. Our employees and their family members can recommend or invest in securities in which our related persons or affiliate, directly or indirectly, have a position or material financial interest. Similarly, we and our related persons can buy or sell for ourselves securities that we also recommend to you. Such transactions can include trading in securities in a manner inconsistent with the advice given to you. In certain instances, the results of the investment activities of our associated or related persons for their accounts can differ from the results achieved by or for the account or accounts that we manage for you. We also maintain common ownership with iAdvise Real Estate, LLC, who provides real estate services to our clients, and receives additional compensation, which may include commissions, for the sale/purchase and management of real estate properties. Such compensation could be paid directly or indirectly by clients of iAdvise Real Estate, which might include advisory clients, as well as other real estate brokers. We have policies and procedures to monitor the potential conflicts disclosed above. We render only disinterested and impartial advice to clients and our goal is to comply with fiduciary obligations. Any conflicts of interest will be disclosed to you in the event they should occur. We are responsible for recommending investments based on your investment objectives and risk tolerance. *Please see [Form ADV Part 2A \(Brochure\) Items 6, 10, 11](#) for more detailed information.*

Conversation Starters 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? Neither we nor any of our supervised persons (employees) accept compensation for the sale of securities or other investment products. Our financial professionals are solely compensated on a salary basis.

Item 4: Disciplinary History

Do you or your financial professionals have legal or disciplinary history? No, we do not, as noted on Form ADV Part 1, Item 11 and Form ADV Part 2A, Item 9. Please visit [Investor.gov/CRS](https://www.investor.gov/CRS) for a free and simple search tool to research us or our financial professionals.

Conversation Starters Ask your financial professional

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

Item 5: Additional Information

To obtain more information, you may visit [Investor.gov](https://www.investor.gov) for a free and simple search tool to research our firm and our financial professionals. To report a problem to the SEC, visit [Investor.gov](https://www.investor.gov) Investor.gov or call the SEC's toll-free investor assistance line at (800) 732-0330. If you have a problem with your investments, investment account or a financial professional, contact us in writing at 747 Third Avenue, Suite 34B, New York, New York 10017. For additional information on our investment advisory services, see our Form ADV on IAPD on [Investor.gov](https://www.investor.gov). Information regarding our firm can be found at adviserinfo.sec.gov or by calling our firm at (212) 686-4601 for up-to-date information.

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?**