



Customer Relationship Summary for Seizert Capital Partners

Introduction

Seizert Capital Partners (“SCP”) is registered with the Securities and Exchange Commission as an investment adviser. Investment advisory services and fees differ from those of a broker-dealer and 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://www.investor.gov/crs), which also provides educational materials about investment advisers and broker dealers, as well as basic investing tutorials.

What investment services and advice can you provide me?

Services: SCP offers investment advisory services to retail investors which includes portfolio management services on an array of equity strategies tailored to your unique circumstances. Our services are offered primarily through a separately managed account you maintain with your broker-dealer, bank, or other financial institution. SCP does not custody or take possession of your assets. We examine your current financial situation and financial goals, to understand your risk tolerance and investment time horizon and to develop your investment strategy. As part of your overall plan, you may utilize one or more SCP strategies.

SCP regularly monitors your account and recommends at least an annual meeting. We offer our services on a “discretionary” basis which grants us the authority to determine the securities or other assets to purchase or sell in your account. This discretion will remain in effect unless revoked by you in writing. SCP will purchase and sell securities in the account consistent with the investment strategy or strategies selected by you (subject to any reasonable restrictions provided in writing to SCP).

We do not offer proprietary investment products, except for collective investment trusts that we sub-advise and make available to certain retirement plan clients. We generally seek to manage client accounts using stocks but may utilize bonds and mutual funds as well.

Requirements to open and maintain an account: SCP does not have a minimum account size for discretionary separately managed accounts.

Additional Information: Additional information on relationships, fees and services can be found in the SCP Form ADV, Part 2A (items 4, 5, 6, 7 and 8) which is available on our website at [scpinv.com](https://www.scpinv.com).

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?*

What fees will I pay?

Principal Fees and Costs: SCP charges an asset-based fee (a percentage of the assets in your separately managed account). The more assets you have under our management, the more you will pay in fees, so we may have an incentive to encourage you to increase your assets under our management. For example, if deemed appropriate and in the best interest of the client, we may recommend that clients withdraw assets from an employer’s retirement plan (or other qualified account) and roll the assets over to an individual retirement account (an “IRA”) that we manage. This presents a potential conflict of interest because it may increase the amount of assets under our management and subject to our billing. SCP fees are generally payable quarterly in arrears, but certain accounts may be billed in advance. SCP’s fees are exclusive of brokerage commissions, wrap program fees, transaction fees, custodial fees, deferred sales charges, exchange fees, SEC fees, transfer taxes, wire transfer, electronic fund fees, and other related costs and expenses which are incurred by the client from custodians or broker.



Additional Information: 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. Additional information can be found in the SCP Form ADV, Part 2A (Items 5-6) which is available on our website, scpinv.com.

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 must 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. For example, for those accounts for which we have discretion to select the broker-dealers to execute transactions, we have a conflict of interest with respect to broker dealers that provide us research and brokerage services. Please refer to Form ADV, Part 2A (Item 12 – *Brokerage Practices (Soft Dollar/Commission Sharing Arrangements)*) which describes how this practice is beneficial to us. You should understand and ask us about these conflicts because they can affect the investment advice we provide you.

Additional Information: Additional information on conflicts of interest can be found in our Form ADV, Part 2A (Items 6,10,11,12 and 14) which is on our website at scpinv.com.

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 financial professionals are paid salaries and can earn bonuses based on their contributions and profitability of the firm. We do not receive any commissions in connection with providing investment advice to clients.

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

No. You can 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?*

Additional Information

For additional information about our services, please visit Investor.gov for a copy of our Form ADV. If you would like additional up-to-date information or a copy this disclosure, please call 248-593-1500 or email us at info@scpinv.com.

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?*