



Form CRS – Client Relationship Summary

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Introduction

Sankala Group LLC (“Adviser”) is registered with the U.S. 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. 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 types of investment services and advice can you provide me?

We offer investment advisory services to both retail and institutional investors for an ongoing asset-based fee calculated on the aggregate market value of the assets we manage for clients. Those assets may include stocks, bonds, real estate investment trusts, mutual funds, exchange traded funds, closed-end funds and cash/money market funds/FDIC CDs. We also provide hourly consulting services on other financial and investment related projects.

If you open an account with us, we’ll meet with you to understand your current financial situation, goals, and risk tolerance. Based on what we learn, we’ll recommend a portfolio of investments to be monitored, adjusted, and maintained on a continuous basis. We will conduct an internal review of your accounts on at least a quarterly basis and, if necessary, rebalance the portfolio and risk to meet your changing needs. Our client accounts are managed on a discretionary basis, which means we don’t need to call you when buying or selling investments in your account. Additional information about our advisory services is found in **Item 4** of our Firm Brochure (*ADV Part II*) which is provided to all clients and is online at <https://adviserinfo.sec.gov/>.

Questions to ask us:

- *Given my situation should I be using an advisor, and if so, why or why not is your firm a good fit for my situation?*
- *Please explain how you choose investments, and particularly how you manage the risks of losing money?*

What fees and costs will I pay?

Fees and costs affect the value of your accounts over time. We charge an asset-based fee ranging between 0.25% and 1.5% annually based upon the value of the assets in your accounts, charged on a quarterly basis. The fee is determined by the amount of assets we manage for you, the strategies you choose, and how many accounts those strategies must be applied to. We are happy to discuss how we determine the fee rate applicable to your situation/family. Fees will be charged directly to your accounts, based on your instructions for tax optimization.

Our incentive is to increase the value of your accounts over time, which will increase our fees over time if we are successful, or decrease our fees if we are unsuccessful.

The custodian or broker-dealer that holds your assets may also charge your accounts fees as well. These fees may include transaction fees when we buy or sell investments, although for most investments we will not pay brokerage commissions, and we seek to minimize other such fees. They may also charge wire fees, check writing fees, and

certain administrative charges which will be detailed on your statements. These fees are in addition to our advisory fee. We do not receive nor share in any portion of those custodial or transaction fees.

Some investments, such as mutual funds and exchange traded funds, also charge fees that reduce the value of your investments. We seek to control those fees to best grow your accounts in value, and are happy to discuss why we might choose to incur them on your behalf. To learn more, please see **Item 5** of our Firm Brochure (ADV Part II) which is provided to all clients and is online at <https://adviserinfo.sec.gov/>.

Questions to ask us:

- *Given the amount I'm seeking to invest, can you illustrate the fees I can expect to pay you, the custodian, and any funds you plan to utilize?*
- *Can you explain how our fees may be reduced if our accounts grow to certain levels over time, or if multiple family members invest with your firm?*

What are your legal obligations to me when acting as my investment adviser? How does your firm make money and what conflicts of interest do you have?

When we act as your investment adviser, we have a fiduciary duty to place your interests ahead of our own and the firm's. At the same time, the way we make money may create some conflicts with your interests. You should understand and ask us about these potential conflicts because they may affect the investment advice we provide you. To learn more, please see **Item 11** of our Firm Brochure (ADV Part II) which is provided to all clients and is online at <https://adviserinfo.sec.gov/>.

Questions to ask us:

- *Can you give me examples of potential conflicts of interest that may arise?*

How do your financial professionals make money?

Our partners/professionals are paid a variable quarterly amount which is derived from the fees charged to the accounts they oversee. Their pay increases when your accounts grow, and their pay decreases when your accounts decline in value. We seek to align our professionals pay with the results they generate for clients. We do not have any fixed salary staff in our firm, nor do we use independent contractors.

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

No, our firm and our professionals do not have any legal and disciplinary history. Visit <https://www.investor.gov/CRS> for a free and simple search tool to research our firm and our professionals.

Additional Information

You can find additional information about our investment advisory services on the SEC's website at <https://adviserinfo.sec.gov> by searching for Sankala Group LLC - **CRD #154806**.

You may also contact us at **(720) 310-0605**, and talk to any one of our investment professionals/partners.

Questions to Ask Us:

- *Who will be my primary contact person at your firm?*
- *Who can I talk to if I have concerns about this person and/or any of their advice/actions?*