

Mountain Hill Investment Partners (IARD #175187)

Client Relationship Summary as of January 2024

Item 1. Introduction

Mountain Hill Investment Partners ("MHIP") is registered with the Securities and Exchange Commission ("SEC"). Our investment advisory services and fees can differ depending on certain services offered 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://investor.gov/CRS), which also provides educational materials about investment advisers and investing.

Item 2. Relationships and Services/ What investment services and advice can you provide me?

We offer discretionary investment advisory services to our clients for a fee. "Discretionary" means the client authorizes us to place trades in their account without notifying them in advance. In limited situations, we may maintain non-discretionary authority which means we have to obtain client approval prior to placing a trade. MHIP allocates clients' investment assets into both equity and fixed income investments, primarily among an offering called the RJJ portfolio which is a Large Cap U.S. portfolio. This hedged offering is a low beta, low P/E and high dividend yield model. MHIP believes the RJJ portfolio is a great alternative for investors looking for a less volatile i.e., lower beta offering, for exposure to equities. We also manage four additional portfolios created through an allocation of exchange-traded funds, and mutual funds, that target different risk and return profiles. MHIP also provides financial planning and consulting services. In addition, MHIP provides educational and consulting non-discretionary services to corporate retirement plans, and employees of those companies.

Mountain Hill Investment Partners prepares a financial plan that may include, but is not limited to: a net worth statement; a cash flow statement; a review of investment accounts, including reviewing asset allocation and providing repositioning recommendations; strategic tax planning; a review of retirement accounts and plans including recommendations; a review of current debts and recommendations for changes, if applicable; a review of insurance policies and recommendations for changes, if necessary; one or more retirement scenarios; estate planning review and recommendations; and education planning with funding recommendations.

The investment philosophy, process, substantial education, and financial planning help our clients understand and stick with the plan personally created for them. We recommend and offer to update your financial plan annually. We monitor accounts on an ongoing basis and generally only trade when our investment committee advises a change, you need or deposit cash, or your investments move out of balance from the model. MHIP has a \$250,000.00 minimum account size threshold.

For additional information, please see our ADV Part 2A Firm Brochure – Items 4,7,8, and 13:

<https://adviserinfo.sec.gov/firm/brochure/128900>

You may also wish to ask us:

- **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. Fees Costs, Conflicts, and Standard of Conduct/What fees will I pay?

We bill most clients an ongoing asset-based fee, charged quarterly in advance. These fees are within a range with a maximum fee of 1.50% annually on assets under management. You may incur transaction costs, charged by our clearing partner, in addition to our management fee. You may also pay the custodian for things like wire transfers, account transfers, account closings, etc. Some investments, such as mutual funds and ETFs, could impose additional fees that could increase your costs.

For consulting and financial planning, MHIP at times charges a fixed or hourly fee. Depending on the size and complexity of the engagement, fixed fees can range from \$2,500 - \$5,000 and the hourly rate from \$450. More information is available in Item 5 of our Firm Brochure.

You will pay fees and costs whether you make or lose money on your investments. Please make sure you understand what fees and costs you are paying.

You may also wish to ask us:

- **Help me understand how these fees and costs might affect my investments. If I give you \$1,000,000 to invest, how much will go to fees, and how much will be invested for me?**

For additional information, please see our ADV Part 2A Firm Brochure – Items 4,5, and 12:

<https://adviserinfo.sec.gov/firm/brochure/128900>

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. We charge a fee on assets that we manage, our firm makes more money when your assets with us grow.

MHIP may earn a higher fee on your retirement plan account rollovers assets, as Corporate 401k plans could charge you less. Financial planning may include a recommendation that you need investment management services. In these situations, MHIP takes its role as your advisor seriously and has implemented controls and mitigation of any conflicts to ensure our clients always receive advice that is in their best interests.

Certain representatives of MHIP maintain licenses with insurance agencies and may earn additional fees on certain insurance products that are purchased by its clients.

For additional information, please see our ADV Part 2A Firm Brochure:

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You may also wish to ask us:

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

How do your financial professionals make money?

No compensation is based upon any sales goals, product sales or any other incentive that would impact a financial professional's advice.

Item 4. Disciplinary History/Do you or your financial professionals have legal or disciplinary history?

No. Neither MHIP or any of its financial professionals have any legal or disciplinary history to disclose. Please visit Investor.gov/CRS for free and simple search tool to research Mountain Hill and its financial professionals.

You may also wish to ask us:

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

Item 5. Additional Information

You may obtain additional information about MHIP including our most recent Client Relationship Summary form by visiting www.mhipartners.com or calling us at 732-291-3338.

You may also wish to ask us:

- **Who is my primary contact person? Whom can I talk to if I have concerns about how this person is treating me?**