

Client Relationship Summary

Figure 8 Investment Strategies LLC (CRD# 282973)

Effective: March 8, 2024



Introduction

Our firm, Figure 8 Investment Strategies LLC ("Figure 8"), is registered as an investment adviser with the U.S. Securities and Exchange Commission. We are a Certified B Corporation and specialize in sustainable, responsible, and impact investing.

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 www.investor.gov/CRS, which also provides educational materials about broker-dealers and investment advisers.

Relationships and Services

What investment services and advice can you provide me?

Services: We offer investment advisory service to individuals, high net worth individuals, trusts, estates, charitable organizations, corporations or other businesses. These services include Comprehensive Investment Management, which is a combination of financial planning and investment management, in addition to Stand-Alone Investment Management, financial planning and educational seminars and workshops. We work closely with you to identify your financial goals and social impact objectives, as well as risk tolerance and financial situation, in order to develop an investment approach.

Accounts, Investments, and Monitoring: We offer equity and balanced account strategies to meet a range of client objectives. Across strategies, we integrate environmental, social, and governance (ESG) factors with traditional financial analysis, and seek to invest in solutions like renewable energy, regenerative agriculture, and community development, where those investments fit with each client's financial goals and risk tolerance. We use primarily individual stocks and bonds, mutual funds, exchange-traded funds, and private placements in constructing portfolios. We do not make available or offer advice with respect to only proprietary products or a limited menu of products or types of investments. As part of our standard services, we monitor portfolios and securities in accounts on a regular and continuous basis. We also offer to meet with you at least annually, or more frequently, depending on your needs.

Investment Authority: We provide our services on a perpetual and discretionary basis. We execute investment recommendations in accordance with your investment objectives without your prior approval of each specific transaction. Our engagement will continue until you notify us otherwise in writing.

Account Minimums & Other Requirements: For Comprehensive Investment Management, Figure 8 generally requires a \$1,000,000 minimum relationship size. For Stand-Alone investment management, Figure 8 generally requires a \$500,000 minimum relationship size. Fees and minimums may be negotiable at the sole discretion of Figure 8.

Additional Information: For more detailed information on our relationships and services, please see Item 4 – Advisory Services, Item 13 – Review of Accounts and Item 7 – Types of Clients of our Form ADV Part 2A available via our firm's [Investment Adviser Public Disclosure Page](#). (Visit www.adviserinfo.sec.gov/firm/summary/282973.)

Conversation Starters: *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?*

Fees, Costs, Conflicts, and Standard of Conduct

What fees will I pay?

Asset-Based Fees: We charge a percentage of assets under management for our Comprehensive Investment Management and Stand-Alone Investment Management services. The fee amount is based on the services provided and follows a tiered schedule that begins at 1.00% annually. This fee is collected on a quarterly basis and calculated as a percentage of the value of the cash and investments in your account[s] that we manage. This means that the more assets that are in your account(s), the more you will pay to us. We therefore have a financial incentive to encourage you to increase the assets in your account.

Fixed Fees: Our fixed fees for financial planning & workshops range from \$100 to \$20,000 per engagement. Fixed fees may be invoiced up to fifty percent (50%) of the expected total upon execution of the financial planning agreement, with the balance due upon completion of agreed upon deliverable[s]. Fixed fees are negotiable based on the nature & complexity of the services to be provided & the overall relationship with us. We provide you an estimate of the total cost prior to engaging us for these services.

Other Fees & Costs: In addition to our advisory fee, you will also be responsible for custody fees, account administrative fees, fees and expenses related to mutual funds and exchange-traded funds and applicable securities transaction fees.

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. For more detailed information on our fees, please see Item 5 – Fees and Compensation of our Form ADV Part 2A available via our firm’s [Investment Adviser Public Disclosure Page](#). (Visit www.adviserinfo.sec.gov/firm/summary/282973.)

Conversation Starters: 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 interests 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. Here is an example to help you understand what this means: we will recommend that you open your account with a specific custodian, where we maintain an institutional relationship and receive economic benefits. The receipt of economic benefits presents a conflict of interest and can influence our recommendation of the custodian to you. However, you ultimately decide where to open your accounts. Choosing a different custodian may result in the loss of quality of service and/or ability to obtain favorable prices.

Additional Information: For more detailed information, please see Item 10 – Financial Industry Activities and Affiliations, Item 12 – Brokerage Practices and Item 14 – Client Referrals and Other Compensation of our Form ADV Part 2A available via our firm’s [Investment Adviser Public Disclosure Page](#). (Visit www.adviserinfo.sec.gov/firm/summary/282973.)

Conversation Starters: 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 compensated with salary and benefits. Our professionals also share in the profits of our firm based on the revenue generated from advisory services and distributed in accordance with our employee ownership agreement.

Disciplinary History

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

No. You can visit www.investor.gov/CRS for a free and simple search tool to research our firm and our financial professionals.

Conversation Starters: As a financial professional, do you have any disciplinary history? For what type of conduct?

Additional Information

You can find additional information about our investment advisory services by viewing our Form ADV Part 2A available via our firm’s [Investment Adviser Public Disclosure Page](#) at www.adviserinfo.sec.gov/firm/summary/282973 or by visiting www.figure8investing.com. You can request up to date information and a copy of our Client Relationship Summary by contacting us at info@figure8investing.com or (208) 385-0078.

Conversation Starters: Who is my primary contact person? Is he or she a representative of an investment adviser or a broker-

Exhibit A – Material Changes to Client Relationship Summary

Updated account minimums and removed section on hourly fees as hourly engagements are no longer offered.