



Form CRS - Client Relationship Summary

Sankala Group LLC (CRD# 154806)

Updated: January 19, 2024

Introduction

Sankala Group LLC ("Adviser") is registered with the U.S. Securities and Exchange Commission ("SEC") as an investment adviser. Brokerage and investment advisory 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 investment services and advice can you provide me?

We offer investment advisory services to retail 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, money market funds, certificates of deposit, and cash.

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 its 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. Our minimum relationship size is \$500,000, unless waived by us.

We also provide consulting services on investment related, financial, and other business matters, billed hourly. When working on a consultative basis, we do not have investment discretion, and your authorization and/or execution of any investment decisions will be required.

To learn more, please see **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 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?

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, billed 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. Business treasury accounts pay our lowest fees. We are happy to discuss how we determine the fee rate

applicable to your situation/family. Fees are charged directly to your accounts, based on your instructions for tax optimization.

Our incentive is to increase the value of your accounts over time. Our fees will increase if the value of the assets in your account increase, and they will decrease if the value of your assets decreases. However, under certain circumstances, when new asset breakpoint levels are met, we will decrease the overall percentage fee rate your accounts pay.

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. 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.

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 may choose to incur such fund fees 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:

- *Help me understand how these fees and costs might affect my investments. If I give you \$500,000 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 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 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 are some examples to help you understand what this means. We may recommend that you open your account with a specific broker/custodian. This broker/custodian may provide us software, services and administrative support which is free of charge to our firm. While this is not a payment, it does represent an economic benefit. We seek to mitigate this conflict by continually making sure the offerings of the chosen broker/custodian are, in our best opinion, competitively enhancing client outcomes and experiences.

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:

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



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How do your financial professionals make money?

Our partners/professionals are paid a variable quarterly amount which is derived from the aggregate 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 use independent contractors to conduct client work.

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.

Questions to Ask Us:

- *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 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 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?*