

Align Impact, LLC ("Align") is an investment adviser registered with the United States Securities and Exchange Commission ("SEC") offering advisory accounts and services. As an investment advisor, our services and fees differ from those provided by a broker-dealer, and it is important that you understand the differences. This document gives you a summary of the types of services and fees we offer. Please visit [investor.gov/CRS](https://investor.gov/CRS) for free, simple tools to research firms and for educational materials about broker-dealers, investment advisers, and investing.

<p><b>What investment services and advice can you provide me?</b></p>	<p>The primary investment advisory services that we offer to retail investors include <b>portfolio management</b> and <b>financial planning</b>.</p> <p>Our <b>portfolio management</b> service is an ongoing service that is individually tailored to meet your values, goals, objectives, time horizon, and risk tolerance. Depending on the terms of your written advisory agreement, our firm may or may not have discretionary management of your assets. When we have discretionary management, it means that we are authorized to manage your assets, including the purchase or sale of investments, without any material limitations and without specific client consent. All portfolio management client accounts are reviewed at least quarterly.</p> <p>Our <b>financial planning services</b> are termed engagements and do not involve any investment authority. Through this service, we help our clients identify their investment strategy and plan. There is one level of review for financial planning, and that is the total review conducted to create the financial plan. This review concludes when the financial plan is delivered to you.</p> <p>We generally limit our investment advice to mutual funds, fixed income securities, real estate funds, equities, private equity funds, ETFs, TIPS/inflation linked bonds, commodities, non-U.S. securities, venture capital funds and private placements. However, we may use other securities to help diversify a portfolio when applicable.</p> <p>There is no account size minimum for our services; however, we do have a minimum annual fee of \$50,000. More information can be found about our services on our Form ADV Part 2A ("<a href="#">Brochure</a>"), specifically Items 4 &amp; 7.</p>	<p><b>Questions to ask us:</b></p> <p>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?</p>
<p><b>What fees will I pay?</b></p>	<p>Our fees vary depending on the services you receive. For our portfolio management services, you will have the option of paying either a flat fee or an asset-based fee (or a combination of both) that is memorialized in your investment management engagement agreement. Paying asset-based fees means that the amount you pay will depend on the amount of assets in your account. We therefore have an incentive to increase the amount of assets in your account in order to increase our fees. Such fees are based on the market value of managed assets on the last day of the previous period. Portfolio</p>	<p><b>Questions to ask us:</b></p> <p>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?</p>

# Client Relationship Summary (CRS - Form ADV Part 3)

March 26, 2024

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	<p>management fees are calculated and billed quarterly in advance.</p> <p>For financial planning services, 50% of the fee is due upon engagement, 25% is due three months after the effective engagement agreement date, with the remainder due upon presentation or completion of the financial plan or upon a mutually agreed-upon schedule. Please also see Items 4 through 8 of our <a href="#">Brochure</a> for further information about our fees.</p> <p>In addition to our fees described above, there are other fees and costs related to our advisory services that you should expect to pay, including subadvisor management fees, custodian fees, and brokerage (transaction) fees. Brokerage fees will incur when we buy or sell an investment for your account. Investments in certain types of securities may incur additional fees (e.g., product-level 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. Please also see our <a href="#">Brochure</a> for additional details on fees, specifically Items 5 and 12.</p>	
<p>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?</p>	<p><i>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.</i></p> <p>Here is an example to you help you understand what this means:</p> <ul style="list-style-type: none"> <li>• Proprietary Products: we offer our retail investors the opportunity to invest in private funds that we manage. Because we are paid an asset-based management fee, we have an incentive to increase the amount of assets in the private funds to increase the amount of fees we receive for managing them.</li> </ul>	<p><b>Questions to ask us:</b></p> <p>How might your conflicts of interest affect me, and how will you address them?</p>
<p>How do your financial professionals make money?</p>	<p>Primarily, we and our financial professionals receive cash compensation from the advisory services we provide to you through the fees we receive from you. Our overall compensation may vary primarily based on the revenue of our firm. Please also see Items 5 and 10 of our <a href="#">Brochure</a> for additional details.</p>	
<p>Do you or your financial professionals have legal or disciplinary history?</p>	<p>No – we do not have any legal or disciplinary events. Visit <a href="https://investor.gov/">investor.gov/</a> for a free, simple search tool to research us and our financial professionals.</p>	<p><b>Questions to ask us:</b></p> <p>As a financial professional, do you have any disciplinary history? For what type of conduct?</p>
<p>Additional Information</p>	<p>For additional information on our firm, advisory services, our people, or our business and relationships, see our <a href="#">Brochure</a> available at <a href="https://adviserinfo.sec.gov/firm/summary/176516">https://adviserinfo.sec.gov/firm/summary/176516</a>. If you have any questions, need additional up-to-date information, or want another copy of this Client Relationship Summary, then please contact us at (805) 243-8055.</p>	<p><b>Questions to ask us:</b></p> <p>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?</p>

**Exhibit A - Material Changes to Client Relationship Summary**

We made the following changes to our most recent Form CRS dated January 28, 2022:

*Fees:* We now disclose that we have a minimum annual fee of \$50,000.

*Financial Planning:* We now disclose that 50% of the fee is due upon engagement, 25% is due three months after the effective engagement agreement date, with the remainder due upon presentation or completion of the financial plan or upon a mutually agreed-upon schedule.

*Additional Information:* We updated our contact phone number.