

Inscription Family Office, LLC
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FORM CRS

Inscription Family Office, LLC is registered with the Securities and Exchange Commission as an investment adviser and, as such, we provide advisory services rather than brokerage services. Brokerage and investment advisory services and fees differ, and it is important for you, our client, to understand the differences. Additionally, 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 broker-dealers, investment advisers, and investing. This document is a summary of the services and fees we offer to “retail” investors, which are natural persons who seek or receive services primarily for personal, family, or household purposes.

What investment services and advice can you provide me?

We offer the following investment advisory services to retail investors: **Family Office Services; Use of Affiliated Manager and Financial Planning Services**. Detailed information regarding our services, fees and other disclosures can be found in our Form ADV Part 2A disclosure by clicking the following link <https://adviserinfo.sec.gov/firm/brochure/301900>. Refer to Advisory Services.

Account Monitoring If you open an investment account with our firm, as part of our standard service we will monitor your investments at least annually. More frequent reviews will be triggered under certain circumstances.

Investment Authority We manage investment accounts on a **discretionary** basis whereby **we will decide** which investments to buy or sell for your account. You may limit our discretionary authority (for example, limiting the types of securities that can be purchased or sold for your account) by providing our firm with your restrictions and guidelines in writing.

Investment Offerings Our services are not limited to a specific type of investment or product, although we do tend to focus primarily certain securities for cash management purposes.

Account Minimums and Requirements In general, we do not require a minimum dollar amount to open and maintain an advisory account; however, we have the right to terminate your account if it falls below a minimum size which, in our sole opinion, is too small to manage effectively.

Key Questions to Ask Your Financial Professional

- **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?

The following summarizes the principal fees and costs associated with engaging our firm for investment advisory services. For detailed information, see our Form ADV Part 2A <https://adviserinfo.sec.gov/firm/brochure/301900>.

- **Family Office Services** - Payable quarterly in arrears as invoiced. A fixed annual fee ranging up to \$500,000.
- **Asset Based Fees** - Payable as invoiced. We may charge a percentage of the assets we manage for you ranging from 0.10% to 0.40%.
- **Affiliated Manager** - For clients referred to Affiliated Managers (Inscription Capital or Camden Wealth Advisors) **and** an all-inclusive advisory service is selected; a portion of the fees will be shared with Inscription Family Office.
- Clients may also pay additional fees and/or expenses. Examples of the most common fees and costs applicable to our clients are:
 - Custodian and account maintenance fees
 - Investment Advisory fees
 - Transaction charges when purchasing or selling securities; and
 - Other product-level fees associated with your investments.

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.

Key Questions to Ask Your Financial Professional

- **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 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.

In addition to our advisory fees, we may make money from our investment advisory services in the following ways:

- ***Third Party Payments:*** Certain Advisory Persons with our firm are registered representative of Purshe Kaplan Sterling Investments ("PKS"). agents. These persons will earn commission-based compensation for the purchase and sale of securities including 12b-1 fees for investment company products. These commissions are separate and in addition to our advisory fees. This practice presents a conflict of interest because they have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs.
- ***Third Party Insurance Payments:*** Certain Advisory Persons with our firm are licensed as independent insurance agents. These persons will earn commission-based compensation for selling insurance products. Insurance commissions are separate and in addition to our advisory fees. This practice presents a conflict of interest because they have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs.

Refer to our Form ADV Part 2A <https://adviserinfo.sec.gov/firm/brochure/301900>

Key Questions to Ask Your Financial Professional

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

How do your financial professionals make money?

Our Company and the financial professional servicing your account(s) are compensated by receiving a percentage of the advisory fees we charge.

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

Yes, our firm or our financial professionals currently have legal or disciplinary history to disclose. These events are disclosed in either our Form ADV or the specific individual's Form U4. These documents can be found by going to Investor.gov/CRS.

Key Questions to Ask Your Financial Professional

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

You can find additional information about your investment advisory services and request a copy of the relationship summary at 713-341-5312 or clicking here: <https://adviserinfo.sec.gov/firm/brochure/301900>.

Key Questions to Ask Your Financial Professional

- **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?**