

## RELATIONSHIP SUMMARY

Brightside Advisory Partners, LLC is registered with the U.S. Securities and Exchange Commission as an investment adviser. Brokerage and investment advisory services and fees differ, 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). This site also provides educational materials about broker-dealers, investment advisers and investing.

### What investment services and advice can you provide me?

Our Firm offers investment advisory services, which are more fully described in our Form ADV Part 2A ("Brochure"). Our services include financial planning, investment consulting and investment management. As part of our standard services, we are monitoring investments that we manage on a continuous and ongoing basis. We accept discretionary authority to implement transactions in client accounts. The level of discretion is determined by our agreement and there are no material limitations on the authority. If you do not grant us discretionary authority, you will make the ultimate decisions regarding the purchase or sale of investments. We offer advice on pooled privately placed securities (such as a hedge Fund, private equity Fund, venture capital Fund or illiquid mutual Fund) and other private placements (including equity, credit or real estate investments). Although we do not impose any requirements such as a minimum account size for investors to establish a relationship with us, many of these investments are available only to qualified investors. We also allocate client assets among mutual funds, exchange-traded funds ("ETFs"), and independent investment managers ("Independent Managers"). Additional information about our services can be found in Items 4, 5 and 7 of our Brochure, which is available to all clients, or by going [here](#).

#### 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?*

### What fees will I pay?

We offer our services on a fee basis. We charge a fee based upon assets under management for investment management and wealth management services. For ongoing services, the annual fee is prorated and charged quarterly. Asset-based fees for single-investment commitments are charged up-front. We charge a fixed or hourly fee for financial planning and investment consulting. The more assets there are in your advisory accounts, the more you will pay in fees, so the Firm may therefore have an incentive to encourage you to increase the assets in your account or manage them in a way where those assets grow and results in us charging higher fees.

In addition to the advisory fees paid to us, you will also incur charges imposed by third parties. These additional charges include securities brokerage commissions, transaction fees, custodial fees, fees and expenses charged to owners of private investments, fees attributable to alternative assets, fees charged by Independent Managers, margin costs, charges imposed directly by a mutual fund or ETF in a client's account as disclosed in the Fund's prospectus (such as Fund management fees and other Fund expenses), deferred sales charges, odd-lot differentials, transfer taxes, wire transfer and electronic fund fees, and other fees and taxes on brokerage accounts and securities transactions.

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. Additional information about our fees can be found in Item 5 of our Brochure, which is available to all clients, or by going [here](#).

**Conversation starter . . .**

- *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 must 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 are some examples to help you understand what this means.

- We receive administrative support, computer software, related systems support, as well as other third-party support from the custodian that we recommend. This results in an incentive to recommend that custodian because we do not have to produce or pay for the products or services provided.
- We are compensated based on the value of the assets under our management, which means we have an incentive to recommend that clients increase the assets to be managed by our Firm.

**Conversation starter . . .**

- *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 based, in whole or in part, on revenue the Firm earns from the financial professional's advisory services or recommendations. This means they have a financial incentive to take steps to maximize revenue to the Firm, including by recommending that clients engage the Firm or increase the assets to be managed by the Firm.

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

No, neither we nor our financial professionals have a legal or disciplinary history. You can visit [investor.gov/CRS](http://investor.gov/CRS) for a free and simple search tool to research us and our financial professionals.

**Conversation starter . . .**

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

**Additional information**

You can find additional information about our services in our Brochure. To request a copy of this Relationship Summary, our Brochure or any of our other disclosure documents, please email us at [info@brightsidepartnersllc.com](mailto:info@brightsidepartnersllc.com) or call us at (410) 989-7500.

**Conversation starters . . .**

- *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?*