

**Item 1: Introduction**

**Moody Aldrich Partners, LLC (“MAP”)** is registered with the Securities and Exchange Commission as an investment adviser. 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 firm and financial professionals at [www.Investor.gov/CRS](http://www.Investor.gov/CRS), which also provides educational materials about broker-dealers, investment advisers, and investing.

**Item 2: Relationships and Services**

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

MAP offers discretionary investment management services to both institutional and individual clients through Separately Managed Accounts (“SMA”) either directly or through programs sub-advised or sponsored by unaffiliated investment advisers, including Wrap (“SMA Wrap”). All SMA Wrap or sub-advised individual investors are advised by an investment consultant/adviser. As such, it is incumbent on the investment consultant/adviser to establish goals and objectives, develop your personal investment policy, monitor, and review those goals and objectives on a routine basis, and create and manage a portfolio based on that policy. When we provide investment advisory services directly to you, we will work with you in selecting one or more strategies amongst our investment offerings based upon your financial situation, goals, experience, and risk tolerance, among other factors. We will monitor your investments on a continuous basis and each SMA in a strategy will be managed in a similar manner, however, we may accept reasonable client-imposed restrictions on investing in certain securities or types of securities. MAP offers clients various equity strategies, including those of its Eastern Shore Capital Management (“ESCM”), Global Value Advisors (“GVA”) and MAP Portfolio Solutions Group (“PSG”) divisions, on a discretionary basis which are detailed further on our website [MoodyAldrich.com/Investments](http://MoodyAldrich.com/Investments).

FOR ADDITIONAL INFORMATION REGARDING OUR SERVICES, PLEASE SEE ITEMS 4 & 7 OF OUR [Form ADV Part 2A](#).

*Ask us the following questions: 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?*

**Item 3: Fees, Costs, Conflicts and Standard of Conduct**

***What fees will I pay?***

For providing Portfolio Management Services to individual investors MAP charges an annualized fee as a percentage of assets under management. Our standard fees vary depending on the strategy selected and may be negotiable under certain circumstances. They are as follows:

<b><u>MAP Strategy</u></b>	<b><u>Fee per Annum</u></b>
ESCM	up to 0.90%
GVA	up to 1.00%
PSG	up to 1.00%

In accordance with the terms of our agreement with you, investment advisory fees are typically billed quarterly in arrears, or in advance, and calculated based on the dollar value of your account at the end of each calendar quarter. You may elect to be billed directly or you may authorize us to invoice the custodian for payment direct from your account. You are also responsible for certain charges imposed by custodians, brokers, and other third parties such as custodial fees, and other fees and taxes on brokerage accounts and securities transactions such as commissions and transaction fees. Investments in shares of mutual funds or ETFs will pay both a

management fee to MAP and also fees and expenses to the mutual fund or ETF. For clients in an SMA Wrap Program, you generally pay an all-inclusive asset-based fee to the Wrap Program Sponsor that will be higher than a typical asset-based advisory fee. The benefit is that transaction costs, brokerage commissions, and/or custodian fees, when trades are directed through the Wrap Sponsor, will be included in your SMA Wrap Fee. However, there may be times when MAP may place trades with a Broker other than the Sponsor which would result in you paying additional fees related to having a brokerage account, including brokerage commissions, transaction fees, fees charged by managers other than MAP, custodial fees, and other transactional or product-level fees. Additional details can be found in Item 12 – Brokerage Practices in our Form ADV Part 2A.

**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.**

***Ask us the following questions:*** 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 when acting as my investment adviser? How else does your firm make money and what conflicts of interest do you have?

**FOR ADDITIONAL INFORMATION REGARDING OUR FEES, PLEASE SEE ITEM 5 OF OUR [Form ADV Part 2A](#).**

**When MAP acts as your investment adviser**, MAP puts your best interest ahead of ours. At the same time, the way MAP makes money can create some conflicts with your interests. You should understand and ask MAP about these conflicts because they can affect the investment advice MAP provides you. The following is an example to help you understand what this means. MAP charges an investment advisory fee based on the assets managed. Your investment consultant/adviser whether affiliated or non-affiliated with us has an incentive to recommend adding assets to an account. The more assets in your account, the more you will pay in fees.

**FOR ADDITIONAL INFORMATION REGARDING MAP'S CONFLICTS, PLEASE SEE ITEM 10 AND 11 OF OUR [Form ADV Part 2A](#)**

***Ask us the following questions:*** How might your conflicts of interest affect me, and how will you address them? How do your financial professionals make money?

MAP pays our financial professionals from the fees we collect from you.

#### **Item 4: Disciplinary History**

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

No. Please go to [Investor.gov/CRS](https://investor.gov/CRS) for a free and simple search tool to research our financial professionals.

***Ask us the following questions:*** As a financial professional, do you have any disciplinary history? For what type of conduct?

#### **Item 5: Additional Information**

For additional information regarding MAP's fees, services, and conflicts, please see MAP's [Form ADV Part 2A](#) ([Full link: https://adviserinfo.sec.gov/firm/summary/106920](https://adviserinfo.sec.gov/firm/summary/106920)), or visit MAP's website at <https://moodyaldrich.com>.

**Please contact MAP at [781-639-2750](tel:781-639-2750) for more up-to-date information or request a copy of this client relationship summary.**

***Ask us the following questions:*** 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?