



Prio Wealth LP

FORM CRS – CUSTOMER RELATIONSHIP SUMMARY

February 16, 2024

<p>Item 1. <u>Introduction</u></p>	<p>Prio Wealth LP is registered with the Securities and Exchange Commission (SEC) 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 firms and financial professionals at Investor.gov/CRS, which also provides educational materials about broker-dealers, investment adviser, and investing.</p>
<p>Item 2. <u>Relationships and Services</u></p>	<p>What investment services and advice can you provide me?</p> <p>We offer investment advisory services to retail investors, including investment management and financial planning services to individuals, multi-generational families, trusts, estates, and small businesses. Our core investment philosophy is based on building portfolios specific to the client's investment and overall financial objectives while considering the impact on taxes.</p> <p>Monitoring</p> <p>We periodically review portfolios for changes in the client's priorities, objectives, risk tolerances, and/or investment strategy.</p> <p>Investment Authority</p> <p>Our clients typically grant us ongoing discretionary authority to manage their accounts, which means that we can buy and sell investments on behalf of our clients without seeking pre-approval of client trades.</p> <p>Limited Investment Offering</p> <p>We generally seek to invest in either the equity of well-established reasonably valued companies in growing markets, or in high-quality fixed income.</p> <p>Account Minimums and Other Requirements</p> <p>We typically seek a \$1 million minimum account value to initiate investment advisory services. Exceptions are made to this minimum dollar value based on other accounts managed, family relationships and the type of investments held.</p> <p>More information about our services is available on Part 2 of our Form ADV, which can be found at https://adviserinfo.sec.gov/firm/summary/105058.</p> <p>Conversation Starters. Ask your financial professional—</p> <ul style="list-style-type: none">• 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>Item 3. <u>Fees, Costs, Conflicts, and Standard of Conduct</u></p>	<p>A. What fees will I pay?</p> <p>The maximum annual fees for our financial planning and investment management services are charged quarterly, and follow the below schedule:</p> <p>1.00% on the first \$5MM 0.75% on the next \$5MM 0.50% on assets above \$10MM</p> <p>This schedule represents the highest fees charged: however, fees will vary from the schedule above based on the terms of each investment advisory agreement. Fees are subject to negotiation. Additional information about our fees is included in Item 5 of Part 2 of Form ADV, available at https://adviserinfo.sec.gov/firm/summary/105058.</p> <p>In addition to our fees, clients bear transaction fees and other third-party investment related fees when we buy or sell investments.</p>



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	<p>We do not charge performance-based fees.</p> <p>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.</p> <p>Conversation Starter. Ask your financial professional—</p> <ul style="list-style-type: none">• 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?
Item 3. <u>Fees, Costs, Conflicts, and Standard of Conduct</u>	<p>B. 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>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 to you. Here are some examples to help you understand what this means.</p> <ul style="list-style-type: none">• Some of our employees buy or sell securities identical to those recommended to or purchased for clients in their personal accounts. This practice results in a potential conflict of interest, as we could have incentive (to the extent possible) to manipulate the timing of such purchases or sales to obtain better pricing or more favorable allocation in rare cases of limited availability.• Some of the broker-dealers that we trade with allocate a portion of the commissions that our clients pay to be used by us to pay for research. These “soft dollar” arrangements help our firm make investment decisions, but they can have the effect of increasing clients’ transaction costs. <p>Conversation Starter. Ask your financial professional—</p> <ul style="list-style-type: none">• How might your conflicts of interest affect me, and how will you address them? <p>More information about conflicts of interest between us and our clients is available on Part 2 of our Form ADV, which is available at https://adviserinfo.sec.gov/firm/summary/105058.</p> <p>How do your financial professionals make money? Prio Wealth LP’s financial professionals receive a salary and may receive a discretionary bonus. Compensation is set with the intention of attracting and retaining highly qualified professionals. Compensation is based on a variety of factors, including the number, value and complexity of accounts under management, and client satisfaction and retention.</p>
Item 4. <u>Disciplinary History</u>	<p>Do you or your financial professionals have legal or disciplinary history?</p> <p>Yes <input type="checkbox"/> No <input checked="" type="checkbox"/></p> <p>Visit Investor.gov/CRS for a free and simple search tool to research us and our financial professionals.</p> <p>Conversation Starter. Ask your financial professional—</p> <ul style="list-style-type: none">• As a financial professional, do you have any disciplinary history? For what type of conduct?
Item 5. <u>Additional Information</u>	<p>Additional information about our services can be found at www.priowealth.com. If you have any questions about the contents of this brochure or would like to request a copy of this relationship summary, please contact us at (617) 224-1900.</p> <p>Conversation Starter. Ask your financial professional—</p> <ul style="list-style-type: none">• 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?