

EDMP, Inc. Form CRS

Item 1 Introduction

02/18/2024

EDMP, Inc. 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 the differences. The SEC offers free and simple tools to research firms and financial professionals at [Investor.gov/CRS](https://www.investor.gov/crs) which also provides information tailored to educate retail investors about financial professionals.

Item 2 Relationships and Services

What investment services and advice can you provide me?

Our firm provides discretionary portfolio management and investment advisory services to retail investors. When you invest on a discretionary basis, our firm will buy and sell investments in your accounts without requiring your pre-approval. We will do this on an ongoing basis until you notify us in writing that you no longer want our services. Portfolio management and the buying and selling of securities are monitored continuously as part of our stand service.

Discretionary investment supervisory services are provided to clients with a minimum relationship size \$1,000,000.00.

*For additional information including minimum investment amounts, please see www.edmpinc.org or <https://www.adviserinfo.sec.gov/IAPD/default.aspx> for our Form ADV, 2A brochure (Items 4 and 7 of Part 2A or Items 4.A. and 5 of Part 2A Appendix 1).

Conversation starters. 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?*

Item 3 Fees, Costs, Conflicts and Standard of Conflict

What fees will I pay?

We are a fee-only advisory firm and are compensated by a percentage of assets we manage for you. Our fees are assessed quarterly in advance and are disclosed in our Form ADV Part 1A, Item 5.E. and more fully described in our Form ADV Part 2A, Items 5.A., B., C., and D. Some fees may create a conflict of interest and these are described in more detail in our Firm's Part 2A. For example, our firm charges asset based fees and are compensated based on a percentage of your assets we manage. Therefore, more assets in the account will cause you to pay more in fees and therefore we may have an incentive to encourage you to increase the amount of money invested in those accounts.

There are no other fees or costs related to our services.

Additional Information:

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.

For more detailed information about our fees and costs please review our Form ADV, Part 2A brochure (specifically Items 5.A., B., C., and D.) which can be found at <https://www.adviserinfo.sec.gov/IAPD/default.aspx>.

Conversation starters. Ask your financial professional:

- *Help me understand how these fees and costs might affect my investments. If I give you \$1,000,000 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 examples to help you understand what this means.

- Our expertise is as an equity manager. If a client believes cash or foreign companies should dominate their portfolio, our revenue would suffer as we generally do not advise on these assets.

Conversation starters. *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?

- Employees are compensated by Salaries.

Item 4 Disciplinary History

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

Our firm has no disciplinary history. Visit Investor.gov/CRS for a free and simple search tool to research our firm and our financial professionals.

Conversation Starters. *Ask your financial professional:*

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

Item 5 Additional Information

You can find additional information about our services by visiting our website at %website% and to request a copy of the relationship summary by emailing us at edmp@edmpinc.com or calling us at 813-960-9600.

Conversation starters. *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?