

Alpine Capital Strategies LLC
Form CRS Customer Relationship Summary
March 1, 2024

Item 1: Introduction

Alpine Capital Strategies LLC is registered with the Securities and Exchange Commission as an investment advisor. Brokerage and investment advisory services and fees differ, and your understanding the differences is important. You can find free and simple tools to research firms and financial professionals at [Investor.gov/CRS](https://investor.gov/CRS), which also provides educational materials about broker-dealers, investment advisors, and investing.

Item 2: Relationships and Services

What investment services and advice can you provide me?

We provide investment advisory services on a fee basis to retail investors:

- *Portfolio Management:* We work with you to develop an appropriate investment plan by reviewing your financial situation, objectives, time horizon, and risk tolerance. We implement the plan by investing in various asset classes including, but not limited to, stocks and bonds. We then monitor your managed portfolio on an ongoing basis and provide you with reports on at least a quarterly basis. Generally, we manage your assets on a discretionary basis, which means that we may buy and sell investments in your account without asking you in advance. We do not limit our advice to any particular products or investments. Generally, we require a minimum of \$3,000,000 in assets to establish a relationship with you.
- *Financial Planning Services:* We may assist you with estate and tax planning issues if requested. Generally, we will charge a separate fee for such services.

Additional Information

Please see our Form ADV, Part 2A brochure for additional information about our services at <https://adviserinfo.sec.gov/firm/summary/111303>. Please contact us if you would like us to send you a free copy of our Part 2A brochure.

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?*

Item 3: Fees, Costs, Conflicts, and Standards of Conduct

What fees will I pay?

Principal Fees and Costs: You will pay ongoing fees on a quarterly basis (1) based on a percentage of the value of your assets under management, (2) based on a fixed periodic amount, or (3) a combination of both. If we charge you based on a percentage of the value of your assets under management, the more assets in your account, the more you will pay in fees. We therefore have an incentive to encourage you to increase the assets in your account.

Other Fees and Costs: You will also be responsible for all securities broker-dealer transaction fees charged by the broker-dealer when we buy or sell an investment for you. You may also be charged for custodial fees by your custodian.

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. Please see Item 5 in our Form ADV, Part 2A brochure for additional information about our fees at <https://adviserinfo.sec.gov/firm/summary/111303>.

Alpine Capital Strategies LLC
Form CRS Customer Relationship Summary
March 1, 2024

Conversation Starters

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: (1) If we charge you based on a percentage of the value of your assets under management, the more assets in your account, the more you will pay in fees. We therefore have an incentive to encourage you to increase the assets in your account; (2) The broker-dealers we use for transactions for your portfolio may provide us research and other similar information. This benefit may create a conflict of interest in our selection of broker-dealers.

Conversation Starters

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

Additional Information

Please see our Form ADV, Part 2A brochure for additional information about our conflicts of interest at <https://adviserinfo.sec.gov/firm/summary/111303>.

How do your financial professionals make money?

Our financial professionals make money from the fees paid to our firm. Our financial professionals are not paid based on commission or other metrics.

Item 4: Disciplinary History

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

No. Please visit Investor.gov/CRS for a free and simple search tool to research us and our financial professionals.

Item 5 Additional Information

You can find additional information about our firm's investment advisory services on the SEC's website at <https://www.adviserinfo.sec.gov> and searching for Alpine Capital Strategies LLC. You may also contact us at 201-826-0051 to request a copy of this relationship summary.

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?