



## Cypress Point Wealth Management, LLC

### Form ADV Part 3 - Customer Relationship Summary

March 2024

<b>Item 1 - Introduction</b>	<p>Cypress Point Wealth Management, LLC ("Cypress Point", "we", "our", or "us") is an investment advisor registered with the Securities and Exchange Commission. 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 <a href="https://www.investor.gov/CRS">Investor.gov/CRS</a>, which also provides educational materials about broker-dealers, investment adviser, and investing.</p>
<b>Item 2 - What types of investment services and advice can you provide me?</b>	<p>Cypress Point offers its investment advisory services to retail investors including investment management, comprehensive financial planning, and family office services. If you engage our firm, we will meet with you to understand your current financial situation, goals, and risk tolerance. Based on what we learn, we may recommend an investment portfolio that is monitored regularly and on an ongoing basis and rebalanced to meet your changing needs, stated goals and objectives. Our clients' accounts are managed on a discretionary basis which means we do not need your approval before buying or selling in your account. You will sign an investment advisory agreement giving us this authority. This agreement will remain in place until one of us terminates the relationship. Cypress Point provides investment advice regarding affiliated and unaffiliated private investment funds. Cypress Point, on a non-discretionary basis, may recommend that certain qualified clients consider investments in affiliated private investment funds. The client retains absolute discretion over all such implementation decisions and is free to accept or reject any recommendation. We do not impose account minimums or limit the scope of our advisory services or the type of securities we advise. Additional information about our advisory services is in Item 4, 7, and 8 of our Firm Brochure which is available online at <a href="http://www.cypresspointwealth.com">www.cypresspointwealth.com</a>.</p> <p><b>Questions to Ask Us:</b></p> <ul style="list-style-type: none"><li>• <b>Given my financial situation, should I choose an investment advisory service? Why or why not?</b></li><li>• <b>How will you choose investments to recommend to me?</b></li><li>• <b>What is your relevant experience, including your licenses, education and other qualifications? What do those qualifications mean?</b></li></ul>
<b>Item 3 - What fees will I pay?</b>	<p>Fees and expenses affect the value of your account over time. You will be charged an ongoing fee on a quarterly basis based on the value of the investments in your account. The more assets there are in a retail investor's account, the more a retail investor will pay in fees, and the firm therefore may have an incentive to encourage the retail investor to increase the assets in his or her account. Our investment fee schedule ranges from 0.50% to 0.90% per year depending on the value of the investments in your account at the end of each quarter. Fees are paid quarterly and in advance. We also charge additional fixed fees for various financial planning and family office services. Our fees vary and are negotiable. Please ask your adviser to give you personalized information on the fees and expenses that you will pay. The custodian that holds your assets can charge you a transaction fee when we buy or sell an investment for you. The custodian's transaction fees are in addition to our advisory fee. You could also pay charges imposed by the custodian holding your accounts for certain investments and for maintaining your account. Some investments, such as mutual funds and exchange traded funds, charge additional fees that will reduce the value of your investments over</p>

	<p>time. 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 is in Item 5 of our Firm Brochure, available online at <a href="http://www.cypresspointwealth.com">www.cypresspointwealth.com</a>.</p> <p><b>Questions to Ask Us:</b></p> <ul style="list-style-type: none"> <li>• <b>Help me understand how these fees and costs will 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?</b></li> </ul>
<p><b>What are your legal obligations to me when acting as my investment adviser?</b></p> <p><b>How does your firm make money and what conflicts of interest do you have?</b></p>	<p><i>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 is one example to help you understand what this means: you will pay us investment advisory fees on assets rolled over from an old 401k plan to an IRA that we manage for you, creating a conflict because Cypress will earn additional compensation as a result of the rollover. Additional information about our conflicts of interest can be found in our Firm Brochure under Items 4, 8, and 11 which is available online at <a href="http://www.cypresspointwealth.com">www.cypresspointwealth.com</a>.</i></p> <p><b>Questions to Ask Us:</b></p> <ul style="list-style-type: none"> <li>• <b>How might your conflicts of interest affect me, and how will you address them?</b></li> </ul>
<b>How do your financial professionals make money?</b>	<p>Our financial professionals are paid a fixed monthly salary and may receive an annual discretionary bonus based on individual and firm performance. We do not compensate our professionals based on investments they use or recommend. The only revenue Cypress Point receives comes directly from our clients – not investment companies, custodians, insurance companies or any other third party.</p>
<b>Item 4 - Do you or your financial professionals have legal or disciplinary history?</b>	<p>No, our firm and our financial professionals do not have any legal and disciplinary history. Visit <a href="http://www.investor.gov/CRS">www.investor.gov/CRS</a> for a free and simple search tool to research our firm and our financial professionals.</p> <p><b>Questions to Ask Us:</b></p> <ul style="list-style-type: none"> <li>• <b>As a financial professional, do you have any disciplinary history? For what type of conduct?</b></li> </ul>
<b>Item 5 - Additional Information</b>	<p>You can find additional information about our firm's investment advisory services and download a copy of this relationship summary on the SEC's website at <a href="http://www.adviserinfo.sec.gov">www.adviserinfo.sec.gov</a> by searching CRD #. You may also contact our firm at (214) 736-8887 and talk to any one of our investment professionals or support staff to request up-to-date information or request a copy of this relationship summary.</p> <p><b>Questions to Ask Us:</b></p> <ul style="list-style-type: none"> <li>• <b>Who is my primary contact person?</b></li> <li>• <b>Is he or she a representative of an investment adviser or a broker-dealer?</b></li> <li>• <b>Who can I talk to if I have concerns about how this person is treating me?</b></li> </ul>