

*Client Relationship Summary dated 3/08/2024 for  
Cannon Capital Management, Inc.*

**Is an Investment Advisory Account Right for You?**

**Item 1: Introduction**

Cannon Capital Management, Inc. is a Registered Investment Adviser with the Securities and Exchange Commission. Brokerage and investment advisory services and fees differ, and it is important for you to understand the differences. Free and simple tools are available to research firms and financial professionals at [Investor.gov/CRS](https://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?**

We offer investment advisory, financial planning, and pension consulting services to retail clients on a regular basis. We monitor and review your accounts on a regular basis as part of our standard service. We offer advisory services to you on a discretionary basis, meaning we buy and sell investments without asking you in advance. We require a minimum account size of \$350,000. For additional information, please see Form ADV, Part 2A Items 4 and 7.

**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 Conduct—What Fees Will I Pay?**

Our investment advisory fees are based on the percentage of assets under management which are billed quarterly in advance. Your asset-based fee is based on the balance in your account as of the last day of the calendar quarter. Our fees vary and are negotiable. Your fee is agreed upon when we begin a relationship with you. You are responsible for the payment of all third-party fees which include custodian fees, brokerage fees, mutual fund fees, and transaction fees. Those fees are separate and distinct from the fees and exchanges we charge.

**The more assets there are in your account, the more you will pay in fees, and we have an incentive to encourage you to increase the assets in your account. 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 additional information, please see Form ADV Part 2A Items 5 and 6.

**ASK YOUR FINANCIAL PROFESSIONAL**

- **Help me understand how these fees and costs might affect my investments. If I give you \$100,000 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**

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.

**ASK YOUR FINANCIAL PROFESSIONAL**

- **How might your conflicts of interest affect me and how will you address them?**  
For additional information, please see Form ADV Part 2A Items 12 and 17.

**How do your financial professionals make money?**

Our financial professionals receive an investment management fee based on a percentage of assets under management. In limited instances, our financial professionals charge an hourly fee for clients without an investment management fee relationship with us.

**Item 4: Disciplinary History—Do you or your financial professionals have legal or disciplinary history?**

No. Visit [Investor.gov/CRS](http://Investor.gov/CRS) for a free and simple search tool to research us and our financial professionals.

**ASK YOUR FINANCIAL PROFESSIONAL**

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

**Additional Information.** *We encourage you to seek additional information.*

For additional information about our investment advisory services or to request a copy of this Relationship Summary, call us at (801)566-3190. Our Form ADV Brochure and this Relationship Summary can also be found at [adviserinfo.sec.gov](http://adviserinfo.sec.gov)

- For additional information on our advisory services, see our Form ADV brochure on IAPD on [Investor.gov](http://Investor.gov) or on the website [adviserinfo.sec.gov](http://adviserinfo.sec.gov) and any brochure supplement your financial professional provides.
- To report a problem to the SEC, visit [Investor.gov](http://Investor.gov) or call the SEC's toll-free investor assistance line at (800) 732-0330. If you have a problem with your investments, account or financial professional, contact us in writing at 6768 South 1300 East Salt Lake City, UT 84121.

**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?**