

# BridgePort Financial Solutions, LLC

## Customer Relationship Summary (Form CRS)

BridgePort Financial Solutions, LLC (“BridgePort”) 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](https://www.investor.gov/crs), which also provides education materials about broker-dealers, investment advisers, and investing.

### WHAT INVESTMENT SERVICES AND ADVICE CAN YOU PROVIDE ME?

BridgePort offers investment advisory services to retail investors, including asset management, financial planning and consulting, and retirement planning and consulting. We also provide advisory services by referring clients to unaffiliated investment advisers. If we charge an ongoing asset-based fee, we will perform ongoing monitoring of your account(s) based upon the scope of services we provide as described in our agreement(s). If we only provide one-time services (i.e., creating a financial plan), we will not monitor your account(s). All recommendations regarding your advisory account will be made in an advisory capacity.

You have the choice to receive non-discretionary or discretionary services from us. When we provide non-discretionary services to you, you make the ultimate decision regarding the purchase or sale of investments. When you authorize us to provide discretionary services to you, we can buy and sell investments in your account without discussing it with you in advance. We have a minimum account size requirement of \$10,000 per household before you can open an account, but exceptions may apply for certain programs or account types. Some programs may have higher minimum size requirements.

For additional information, please review BridgePort’s Form ADV at <https://adviserinfo.sec.gov/firm/summary/325485>.

Conversation Starters	<ul style="list-style-type: none"><li>Given my financial situation, should I choose an investment advisory service? Why or why not?</li><li>How will you choose investments to recommend to me?</li><li>What is your relevant experience, including your licenses, education and other qualifications? What do these qualifications mean?</li></ul>
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### WHAT FEES WILL I PAY?

You will pay a fee for our services based upon the type of service you receive. This can include asset-based fees, fixed fees, hourly fees, and program fees. Any fees paid and the frequency charged will be agreed upon by you when contracting with BridgePort for investment advisory services.

- Asset-based fee – the fee is a percentage of all assets in your account, charged on an ongoing basis
- Fixed fee – the fee is a set amount, charged either one-time or on an ongoing basis

You will typically also pay other fees, depending on your account type. These include annual account administration fees, custodian fees, account maintenance fees, and other ancillary fees. For some type of accounts, there is a per transaction fee or ticket charge, which is in addition to the

asset-based fee. If you pay an asset-based fee, the more assets there are in your account, the more you will pay in fees. This gives us an incentive to encourage you to increase the assets in your account. If you pay an hourly fee, this gives us an incentive to incur more time providing services to you. For additional information on fees, please review the BridgePort Form ADV Part 2A and Wrap Brochure.

**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.**

Conversation Starters	<ul style="list-style-type: none"><li>Help me understand how these fees and costs might affect my investments.</li><li>If I give you \$10,000 to invest, how much will go to fees and costs, and how much will be invested for me?</li></ul>
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**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.

BridgePort receives payments from certain third parties (e.g., third-party managers, product sponsors, etc.) based on the aggregate amount of assets invested or under management. These payments may affect which products and third-party managers we make available. Clearing broker-dealers and custodians also provide products and services that benefit us but not client accounts, including software and technology, research, and other support. These payments represent additional compensation to us, which results in a financial incentive to recommend managers and clearing broker-dealers and custodians that provide this additional compensation over those that do not.

This document is a summary and does not contain all of the information you might consider relevant regarding products, fees, conflicts, and compensation. For more information on these conflicts, see our Form ADV Part 2A.

**Conversation Starters**

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

**HOW DO YOUR FINANCIAL PROFESSIONALS MAKE MONEY?**

Our financial professionals charge fees for the investment advisory services they provide. These fees are one-time and/or ongoing and are based on a fixed rate and/or as a percentage of assets in your account. Fixed rate fees are agreed upon by you and the financial professional and are based on the time and complexity it takes to meet your needs. Generally, financial professionals will be compensated through a base salary and bonus.

- Certain financial professionals will also receive cash or non-cash compensation, such as merchandise, gifts, technology, travel expenses, and lodging, directly from investment managers or sponsors. As noted above, our financial professionals have an incentive to have more assets in your account if they are paid by an asset-based fee. If they receive an hourly rate, they have an incentive to bill for more hours of work. Financial professionals who receive cash or non-cash compensation have an incentive to sell more of that sponsor or manager's products.

**DO YOU OR YOUR FINANCIAL PROFESSIONALS HAVE LEGAL OR DISCIPLINARY HISTORY?**

Not for our firm. Yes, for our financial professionals. Visit [Investor.gov/CRS](https://investor.gov/CRS) for a free and simple search tool to research us and our financial professional.

**Conversation Starters**

- As a Financial professional, do you have any disciplinary history?
- If so, for what type of conduct?

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**ADDITIONAL INFORMATION**

For additional information, please review the BridgePort Form ADV Part 2A at <https://adviserinfo.sec.gov/firm/summary/325485>. You may obtain a copy of our Form CRS at this website or by asking your financial professional or by calling us at 877-411-2737.

**Conversation Starters**

- Who is my primary contact person? Is he or she a representative of an investment adviser or broker-dealer?
- Who can I talk to if I have concerns about how this person is treating me?