

Wilkinson Global Asset Management LLC
FORM CRS – CUSTOMER RELATIONSHIP SUMMARY
March 2024

Item 1. <u>Introduction</u>	Wilkinson Global Asset Management LLC 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 , which also provides educational materials about broker-dealers, investment advisers, and investing.
Item 2. <u>Relationships and Services</u>	<p>What investment services and advice can you provide me?</p> <p>We offer investment advisory services to high-net-worth-individuals, families and their associated trusts; estates; and other legal entities. Our advisory services are focused towards achieving portfolio growth through long term capital appreciation primarily in the global equity and bond markets.</p> <p>Monitoring</p> <p>Each Client account is assigned a primary Portfolio Manager. Client account performance is reviewed on an ongoing basis by the primary portfolio manager and the performance of all accounts is reviewed weekly by the members of the Investment Committee. Account allocation by asset class and equity allocation by sector and geography is reviewed weekly by the Investment Committee. Individual account reviews are triggered by anomalous performance versus the peer group average, tax considerations or a change in client investment objectives.</p> <p>Investment Authority</p> <p>We generally have the discretionary authority to determine the securities to be bought or sold and the amounts of the securities to be bought or sold on behalf of our Clients, without obtaining specific Client consent. Certain accounts, however, are non-discretionary. Clients of these accounts have requested that their approval be obtained with regard to such decisions.</p> <p>Limited Investment Offering</p> <p>We do not participate in wrap fee programs.</p> <p>Account Minimums and Other Requirements</p> <p>Generally, WGAM requires a minimum account balance of \$3,000,000 for our Global Balanced Strategy and Bespoke Portfolios and \$1,000,000 for our Global Franchise and Global Equities Strategies. Additionally, WGAM recommends reasonably compatible investment objectives, and full investment and trading discretion. More information about our services is available on Part 2 of our Form ADV, which can be found at: https://adviserinfo.sec.gov/firm/summary/292470</p> <p>Conversation Starters. Ask your financial professional—</p> <ul style="list-style-type: none">• 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. <u>Fees, Costs, Conflicts, and Standard of Conduct</u>	<p>A. What fees will I pay?</p> <p>We charge clients an investment management fee that is based on the total portfolio value of an account on the last business day of the quarterly billing cycle. Clients are billed quarterly, generally in arrears (although certain clients are billed in advance), at one-fourth of the rate specified hereinafter. The basic fee schedule is 1.00% per annum for Global Equity, Balanced, and Bespoke Portfolios, and 0.75% for our Global Franchise Equity Strategy, however, WGAM has discretion to negotiate or waive fees on a case-by-case basis. Additional information about our firm's fees is included in Item 5 of Part 2 of Form ADV, available at: https://adviserinfo.sec.gov/firm/summary/292470</p> <p>In addition to our investment management fees, clients bear trading costs and custodial fees. To the extent that clients' accounts are invested in mutual funds or ETFs, these funds pay a separate layer of management, trading, and administrative expenses.</p>

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	<p>We do not charge performance-based fees.</p> <p>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.</p> <p>Conversation Starter. Ask your financial professional—</p> <ul style="list-style-type: none">• 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?
Item 3. <u>Fees, Costs, Conflicts, and Standard of Conduct</u>	<p>B. 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?</p> <p><i>When we act as your investment adviser</i>, we must 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 to you. Here is an example to help you understand what this means.</p> <ul style="list-style-type: none">• Sometimes securities transactions are effected through broker-dealers or counterparties selected by us. Such broker-dealers may provide us with certain research products and services which enhance our investment management capabilities, but not all such products and services may be used by us in connection with the accounts which paid commissions to the brokers providing the services. <p>Conversation Starter. Ask your financial professional—</p> <ul style="list-style-type: none">• How might your conflicts of interest affect me, and how will you address them? <p>More information about conflicts of interest between us and our clients is available on Part 2 of our Form ADV: https://adviserinfo.sec.gov/firm/summary/292470</p> <p>How do your financial professionals make money? Our financial professionals receive a salary and may receive a discretionary bonus. Compensation is set with the intention of attracting and retaining highly qualified professionals. Compensation is based on a variety of factors, including competitive market rates, the number, value and complexity of accounts under management, the performance of those accounts, client satisfaction and retention, job performance and tenure.</p>
Item 4. <u>Disciplinary History</u>	<p>Do you or your financial professionals have legal or disciplinary history? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/></p> <p>Visit Investor.gov/CRS for a free and simple search tool to research us and our financial professionals.</p> <p>Conversation Starter. Ask your financial professional—</p> <ul style="list-style-type: none">• As a financial professional, do you have any disciplinary history? For what type of conduct?
Item 5. <u>Additional Information</u>	<p>More information about our services can be found at: https://adviserinfo.sec.gov/firm/summary/292470 If you have any questions about the contents of this brochure or would like to request a copy of this relationship summary, please contact us at (212) 301-6864 or cwilkinson@wilkinsongam.com.</p> <p>Conversation Starter. Ask your financial professional—</p> <ul style="list-style-type: none">• 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?