



# IRONVINE

CAPITAL PARTNERS, LLC

## Client Relationship Summary

Dated: February 14, 2023

Ironvine Capital Partners, LLC (“Ironvine”) is registered with the United States Securities and Exchange Commission as a Registered Investment Adviser. Brokerage and investment advisory services and fees differ and it is important for the retail investor to understand the differences.

Free and simple tools are available to research firms and financial professionals at [Investor.gov/CRS](https://investor.gov/CRS), which also provides educational materials about broker-dealers, investment advisers, and investing.

### *What investment services and advice can you provide me?*

We offer investment advisory services to retail and institutional investors. Our principal service is investment management with a focus on long equity positions. We also offer retirement plan investment consulting and advisory services.

The underlying securities within our portfolios are regularly monitored. Accounts are reviewed quarterly at a minimum and will typically be reviewed much more frequently on an ad-hoc basis. This is part of our standard service.

Our services are provided on a discretionary basis. Prior to engaging Ironvine to provide investment advisory services, clients enter into a written agreement with Ironvine that sets forth the scope of our discretion, including the ability to buy and sell securities without first requesting your consent.

As a general rule, we require a minimum account size of \$250,000. We may waive or increase account minimums at our sole discretion.

For additional information, we suggest you review our Form ADV 2A, specifically Items 4 and 7, available here: <https://adviserinfo.sec.gov/firm/brochure/168892>

#### ***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?***

### *What fees will I pay?*

For our services, you will pay us an annual management fee, paid quarterly, in advance, based on the value of your assets under management as of the last day of the previous quarter. A conflict of interest exists in that the more assets you have in an account, the more you will pay us in fees. Therefore, we may have an incentive to encourage you to increase the assets in your accounts.

You will pay additional fees to the custodian of your assets such as for legal transfers of securities, wiring fees, or trading costs. Information about those fees is discussed in your custodial agreement.

For more detailed information, please review Form ADV 2A, specifically Item 5, available here: <https://adviserinfo.sec.gov/firm/brochure/168892>

**Ask your financial professional:**

- *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.

Because we engage in transactions that are substantially the same as those made for client accounts, conflicts of interest are substantially reduced, but still exist. We recognize the fiduciary responsibility to place your interests first and have established policies in this regard to avoid any potential conflicts of interest.

**Ask your financial professional:**

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

For more information about our conflicts of interest, please review our Form ADV Part 2A, available here: <https://adviserinfo.sec.gov/firm/brochure/168892>

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

Our financial professionals are paid a salary and the profits of the firm are distributed to owners according to their ownership percentage. The profitability of our business is largely determined by our assets under management, and therefore our financial professionals have an incentive to grow our assets under management.

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

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

**Ask your financial professional:**

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

You may request additional information about our firm and its services by contacting us at 402-916-1702. Information about us is found both in our Form ADV Part 2A as well as the Client Relationship Summary, both of which are available at 402-916-1702 or online at <https://adviserinfo.sec.gov/firm/brochure/168892>

**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?*