

## Item 1: Introduction

CH Investment Partners, L.L.C. 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://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 provide discretionary (you allow us to make investment trade decisions without your approval) and non-discretionary (we make recommendations, but you ultimately make all investment trade decisions) investment advisory services to individuals, families, and entities. Our advisory services include portfolio management; financial planning; investment selection and advice; account monitoring; quarterly account reporting; administration; and consulting. Client meetings are conducted at least annually to discuss your current financial situation, resources, goals, risk tolerance, and portfolio changes. Advisory services provided are in accordance with the terms, conditions, guidelines and limitations set forth in each client's investment advisory agreement. We also provide discretionary advisory, management, consulting, administrative, and other services to affiliated private pooled investment vehicles which we recommend to qualified client accounts for investment.
- Although we do not have a stated minimum account size, clients who work with us have investment advisory needs that align with the investment advisory services we provide and the investment opportunities we offer. In general, our goal is for each client and/or its affiliates to ultimately have, in the aggregate, at least \$40 million in assets under our management, advisement or supervision.

For additional information, see items 4 & 7 of our Part 2A of Form ADV at <https://adviserinfo.sec.gov/firm/brochure/301481>

### **Conversation Starter - 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?***

In consideration of our advisory services, the principal fees and costs are ongoing asset-based advisory fees and/or fixed fees. "Asset based" fees are calculated as a percentage of the assets invested in your advisory account according to the fee schedule in your advisory agreement with us. This means that the more assets you invest in your account, the more you will pay in fees, and therefore ***we have an incentive to encourage you to increase your advisory account assets.*** Our clients typically pay the advisory fee each quarter, but please see your advisory agreement. You also pay or are subject to various other fees that your account's custodian charges, including wire fees, transfer fees, bank charges and other fees, as well as brokerage commissions, and fees and expenses that are included in the expense ratios of your investments, including mutual funds and our affiliated pooled investment vehicles (including underlying manager fees and underlying fund fees and expenses). We are entitled to receive performance-based compensation with respect to investors in certain of our affiliated pooled investment vehicles.

**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 investment over time. Please make sure you understand what fees and costs you are paying.**

For additional information, see items 5.A, 5.B, 5.C & 5.D of our Part 2A of Form ADV at <https://adviserinfo.sec.gov/firm/brochure/301481>

**Conversation Starter - Ask Your Financial Professional:**

- Help me understand how these fees and costs might affect my investments. If I give you \$1,000,000 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 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.

- We and our affiliates manage and sponsor various pooled investment vehicles and we regularly recommend that our clients invest all or a portion of their account assets in such vehicles. We earn higher fees (such as performance-based compensation), compensation and other benefits when you invest in a vehicle or product that we (or one of our affiliates) manage, sponsor or advise, such as an affiliated pooled investment vehicle. As such, we have an incentive to recommend (or to invest your assets in) those vehicles or products over third-party managed vehicles or products.
- We and our affiliates and clients receive or may receive certain direct or indirect benefits from third party managers, sponsors or their affiliates when we recommend certain securities or investments to clients or we cause clients to invest in certain investments or vehicles or products. As such, we have an incentive to recommend (or invest your assets in) investment vehicles or products of sponsors, managers and affiliates thereof that provide such direct or indirect benefits to us, over investment vehicles or products that do not provide such benefits.

**For additional information**, please see Items 6, 8, 10, 11 & 12 of our Part 2A of Form ADV at <https://adviserinfo.sec.gov/firm/brochure/301481>

**Conversation Starter - Ask Your Financial Professional:**

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

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

Our financial professionals are employees of the firm and receive annual salaries and performance-based bonuses as compensation for their services to the firm. Our financial advisors do not accept or receive any compensation from us for the sale of securities or other investment products.

**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.

**Conversation Starter - Ask Your Financial Professional:**

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

**Item 5. Additional Information**

**For additional information about our investment advisory services**, see our Form ADV on IAPD at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) and any brochure supplement your financial professional provides. If you would like additional, up-to-date information or a copy of this relationship summary, please call us at 214-661-8333 or visit our website at [www.chinvestments.com](http://www.chinvestments.com).

**Conversation Starter - Ask Your Financial Professional:**

- 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?