

## Introduction

Our firm, Hamilton Capital Partners, LLC, is an investment adviser registered 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://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 are a registered investment adviser that offers investment advisory services, including Asset Management, Financial Planning and Consulting, Retirement Plan Consulting, Family Office Concierge and General Consulting services to retail investors. If you open an advisory account with our firm, we'll meet with you to understand your current financial situation, existing resources, objectives, and risk tolerance. Based on what we learn, we'll recommend a portfolio of investments that is monitored at least annually, and if necessary, rebalanced to meet your changing needs and goals. We'll offer you advice on a regular basis and contact you at least annually to discuss your portfolio. For more information about these services, please see Item 4 of our ADV Part 2A available [here](#).

You can select in our agreement whether we are allowed to buy and sell investments in your account without asking you in advance (“discretion”) or only after receiving your permission (“non-discretion”). If you select non-discretion, you make the ultimate decision regarding the purchase or sale of investments. Any limitations will be described in the signed advisory agreement. We will have discretion or non-discretion until the advisory agreement is terminated by you or our firm. We do not restrict our advice to limited types of products or investments.

Our firm generally requires a minimum relationship balance of \$5,000,000 to open and maintain an account for our Asset Management Service. However, this general minimum is negotiable and may be waived at our firm's sole discretion.

Financial Planning & Consulting is also offered as a separate service for a flat fee. We do not monitor your investments for the Financial Planning & Consulting service. For additional information, see Items 4 and 7 of our ADV 2A, available [here](#).

### Questions to Ask Us:

- 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 those qualifications mean?

## What fees will I pay?

You will be charged an ongoing annual fee applied quarterly based on the value of the assets in your account. Our maximum Asset Management Service annual fee is 1.5%. The more assets you have in your advisory account, the more you will pay us. We therefore have an incentive to increase the assets in your advisory account in order to increase our fees. Our fees vary and are negotiable. The amount you pay will depend, for example, on the services you receive and the amount of assets in your account.

Our maximum flat fee is \$100,000 for our Financial Planning & Consulting Service. Our firm requires a retainer of 50% of the ultimate financial planning or consulting fee at the time of signing. The remainder of the fee will be directly billed to the client and due within 30 days of a financial plan being delivered or consultation rendered. Our maximum flat fee is \$10,000 for our Retirement Plan Consulting service, and the maximum hourly fee will not exceed \$500. Our maximum flat fee is \$100,000 for our Family Office Concierge Service and the fee-paying arrangement shall be negotiated with the client on a case-by-case basis. Our General Consulting services are negotiable and vary depending upon the specific needs of each client. The more time spent on the project means you will pay more.

The fees you pay to us do not include the fees and expenses charged to you by the following: mutual fund companies, as mutual funds charge shareholders advisory fees, administrative fees, and other operational related fees and expenses; commissions or transaction costs charged by your custodian or the executing broker we may select when purchasing or selling securities; and custody and related administrative fees charged by broker dealers and custodians.

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, see Item 5 of our ADV 2A, available [here](#).

**Questions to Ask Us:**

- Help me understand how these fees and costs may 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 providing recommendations 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:*

Our firm’s financial professionals include licensed insurance agents who sell insurance products for a commission. They have an incentive to recommend insurance products to you in order to increase their compensation. Our firm is also registered as an insurance brokerage firm. Clients may be solicited to use the services of this firm and our representatives will receive commissions as a result of these transactions. A conflict of interest exists as these commissionable sales create an incentive to recommend products based on the compensation earned. To mitigate this potential conflict, our firm will act in the client’s best interest.

For additional information, see Items 10 and 12 of our ADV 2A, available [here](#).

**Questions to Ask Us:**

- 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 compensated based on the revenue our firm earns from their advisory services or recommendations, the amount of client assets they service, and the time and complexity required to meet a client’s needs.

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

No. A free and simple search tool to research us and our financial professionals is available at [investor.gov/CRS](http://investor.gov/CRS).

**Questions to Ask Us:**

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

**Additional Information**

You can find additional information about our firm’s investment advisory services on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching CRD #314344. You may also contact our firm at (678) 802-4974 to request a copy of this relationship summary and other up-to-date information.

**Questions to Ask Us:**

- 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?

**Material Changes**

The following material changes have been made to this Form CRS since our most recent filing in January 2024:

- Minimum amount required to open an account for Asset Management is \$5,000,000.