



ArchPoint Investors
FORM CRS – CUSTOMER RELATIONSHIP SUMMARY

September 4, 2024

Item 1. Introduction. ArchPoint Investors (“ArchPoint”) is registered with the Securities and Exchange Commission as an investment adviser. ArchPoint is not a broker nor performs brokerage services. Brokerage and investment advisory services and fees differ greatly, 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 investment advisers, broker-dealers, and investing.

Item 2. Relationships and Services

What investment services and advice can you provide me? We offer investment advisory services to Family Offices, Institutions, High-Net-Worth Individuals and their associated trusts, estates, foundations and retirement accounts. Services include asset allocation, manager due diligence & selection, and individual security selection. We manage our clients’ assets based on the individual needs of each client. We initially meet with clients to determine their services requested, risk tolerance and time constraints and establish acceptable goals, policies, and investment objectives.

Monitoring. We formally review client’s portfolios no less frequently than quarterly and make appropriate changes and recommendations to a client’s portfolio holdings as needed to maintain the objectives of the client.

Investment Authority. We offer our investment services on both a discretionary and non-discretionary basis. For discretionary relationships, ArchPoint has the authority to purchase a security or fund on behalf of the client without seeking the client’s pre-approval. For non-discretionary, ArchPoint would make a recommendation to a client to purchase a security or fund with the client having the ultimate decision-making authority.

Limited Investment Offering. We do not currently make available or offer advice only with respect to proprietary products, or a limited menu of products or types of investments.

Account Minimums and Other Requirements. ArchPoint services clients of significant wealth but does not state any minimum account size or fee. Additional Information about ArchPoint’s services is available on Part 2 of our Form ADV, which is available at <https://adviserinfo.sec.gov/firm/summary/151807>.

Conversation Starters. 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? Advisory fees are negotiable depending on the size and nature of the relationship. Although some clients pay their fees on a monthly basis, fees charged on a percentage of assets are generally payable quarterly during the quarter in which services are rendered (within 30 days after the start of each calendar quarter) based upon the most recent quarter-end fair market value of assets under management. Additional information about our firm’s fees are included in Item 5 of Part 2 of Form ADV, available at <https://adviserinfo.sec.gov/firm/summary/151807>.

ArchPoint is compensated solely by its clients. We do not receive any commissions, placement fees, wrap fees, or compensation from funds we recommend or purchase.

All fees paid to us are in addition to any brokerage fees and fees and expenses clients incur in assets supervised by us, including, but limited to, separate accounts managed by other managers, private investment funds, mutual funds and real estate investments. Any fees and expenses charged to clients by managers, private investment funds or mutual funds are described in their respective investment management agreements, offering memorandums, subscription agreements or mutual fund prospectuses. These fees generally include an investment management fee and performance fee.

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.



Conversation Starter. 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 interests 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 have adopted a Code of Ethics that is designed to comply with Rule 204A-1 under the Investment Advisers Act of 1940. The Code establishes rules of conduct for all employees and is designed to emphasize ArchPoint's overarching fiduciary duty to its clients.
- We advise multiple clients, and we allocate our time based on each client's needs. Our firm earns more as we expand our client base and grow our assets under management.
- We have accepted performance-based fee arrangement from certain clients. Performance based fee arrangements may create an incentive for the firm to make investment decisions which may be riskier than those which would be made under a different fee arrangement. Such fee arrangements have the potential to create an incentive to favor higher fee-paying accounts over other accounts in the allocation of investment opportunities.

Conversation Starter. Ask your financial professional-

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

Additional information about conflicts of interest between ArchPoint and its clients is available on Part 2 of our Form ADV, which is available at <https://adviserinfo.sec.gov/firm/summary/151807>.

How do your financial professionals make money?

ArchPoint's financial professionals receive a salary and may receive a discretionary bonus. Compensation is set with the intention of attracting and retaining highly qualified professionals and based on a variety of factors, including contributions to the firm, AUM, and client performance.

Item 4. Disciplinary History

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

No. Visit 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?**

Item 5. Additional Information. Additional information about our services can be found at <https://adviserinfo.sec.gov/firm/summary/151807>. If you have any questions about the contents of this brochure or would like to request a copy of this relationship summary, please contact Stasi Tcherneva at 786-810-3660.

Conversation Starter. Ask your financial advisor-

- **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?**