

**Item 1 - Introduction**

Strategic Advisory Partners, LLC is an SEC-registered investment adviser that provides advisory services. 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. This document is a summary of the services and fees we offer to “retail” investors, which are natural persons who seek or receive services primarily for personal, family, or household purposes.

**Item 2 – Relationship Services*****What investment services and advice can you provide me?***

We offer investment advisory services to retail investors. As part of these services, we offer Financial Planning Services, Portfolio Management Services, Pension Consulting Services, and Sponsor of a Wrap Fee Program(s).

Monitoring investments is not one of the principal investment advisory services that our firm offers. We manage investment accounts on a discretionary basis whereby we will decide which investments to buy or sell for your account. You may limit our discretionary authority, for example, limiting the types of securities that can be purchased or sold for your account, by providing our firm with your restrictions and guidelines in writing. We offer advice on equity securities, mutual fund shares, United States government securities, private placements, money market funds and ETFs. In general, we require a minimum account size of \$500,000 to open and maintain an advisory account, which may be waived at our discretion.

*For additional information, see Item 4, 7, and 8 of our Form ADV Part 2A brochure, and Items 4 and 5 of our Form ADV Part 2A Appendix 1 Brochure, accessible [here](#).*

**Key questions to ask:**

- 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?***

The following summarizes the principal fees and costs associated with engaging our firm for investment advisory services:

- Asset Based Fees are payable quarterly in advance. Since the fees we receive are asset-based (i.e. based on the value of your account), we have an incentive to increase your account value which creates a conflict especially for those accounts holding illiquid or hard-to-value assets;
- Hourly Fees are payable in arrears;
- Fixed Fees are payable 50% up front and the remainder invoiced at the completion of services;
- Annual Fees are paid in advance of the month or quarter;
- Wrap Program Fees are payable quarterly in advance, based on the balance at end of billing period. Asset-based fees associated with a wrap fee program generally include most transaction costs and fees to a broker-dealer or bank that has custody of the assets; therefore, the asset-based fee is higher than a typical asset-based advisory fee. Since our firm pays the transaction costs associated with securities transactions in your account, we have an incentive to minimize the trading in your account.

Examples of the most common fees and costs applicable to our clients are:

- Custodian fees;
- Account maintenance fees;
- Fees related to mutual funds and exchange-traded funds;
- Transaction charges when purchasing or selling securities; and
- Other product-level fees associated with your investments.

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, please see Items 5 and 6 of our Form ADV Part 2A Brochure, accessible [here](#).*

**Key questions to ask:**

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? 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 our revenue is derived from asset-based fees, we have an incentive to grow your account as much as possible. This could cause us to take overly aggressive positions in conflict with your interests in an attempt to grow your account or could incentivize us to inflate the valuations of illiquid investments held in your account.

*For more information about our conflicts, please see Item 10 of the Form ADV Part 2A brochure and Form ADV Part 2 Appendix 1 Brochures, accessible [here](#).*

**Key questions to ask:**

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 through salary and bonus arrangements. Their compensation may be influenced by the amount of client assets they service and by the revenue the firm earns from their services or recommendations.

**Item 4 – Disciplinary History**

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

No, our firm and our financial professionals currently do not have any legal or disciplinary history to disclose. A free and simple search tool to research us and our financial professionals is available at [investor.gov/CRS](http://investor.gov/CRS).

**Key questions to ask:**

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

**Item 5 – Additional Information**

Additional information about our investment advisory services and an up-to-date copy of the relationship summary is available by contacting us at 336-790-2560, and also accessible [here](#).

**Key questions to ask:**

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?