

A Summary of Your Advisory Relationship with Curated Wealth Partners, LLC
03/12/2021

Item 1. Introduction

Curated Wealth Partners, LLC is registered with the U.S. Securities and Exchange Commission (“SEC”) as an investment adviser. Clients and prospective clients should be aware that brokerage and investment advisory services and fees differ, and it is important for retail investors to understand the differences. Free and simple tools are available to research advisory firms like us at 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?

Services: We generally offer our retail investors holistic investment advisory services, consulting services and Family Office Services. Our investment advice covers a wide variety of asset classes in both public and private markets including equities, fixed income, hedge funds, direct equity or debt investments in private companies and direct real estate investments, as well as, private equity and real estate fund investments. Our holistic investment advisory services are customized for you based on your specific goals, objectives and risk tolerance. Our Family Office Service capabilities include bookkeeping and bill pay services, cash flow analysis, and financial statement preparation. We offer consulting services on a broad range of topics including business planning, trust and estate planning and more. When you grant us **discretionary** authority for investment advisory services, you provide us the authority to determine the investments to buy or sell in your account on an ongoing basis. Investment advisory services also involve providing you with continuous and on-going supervision over your accounts. This means that we will continuously monitor your account(s) and make trades in your accounts when appropriate. You will have the opportunity to place reasonable written restrictions on the types of investments to be held in the portfolio and should notify us in writing of any changes in your financial status, investment objectives, policies, or restrictions. In cases where there are **non-discretionary** advised assets, we will provide investment advice, but you are ultimately responsible for directing the trading decisions for those assets.

Requirements to open and maintain an account: As a condition for starting and maintaining an investment management relationship, we impose a minimum portfolio value of \$25,000,000 and/or a minimum fee of \$250,000. We may, in our sole discretion, accept clients with smaller portfolios or charge a lesser fee based upon certain criteria, including anticipated future earning capacity, anticipated future additional assets, dollar amount of assets to be managed, related accounts, account composition, preexisting client, account retention, and pro bono activities. We may aggregate the portfolios of family members to meet the minimum portfolio size.

ADDITIONAL INFORMATION: Additional information can be found in our Form ADV, Part 2A, Items 4, 7, 8, 12, & 13 available at: https://files.adviserinfo.sec.gov/IAPD/Content/Common/crd_iapd_Brochure.aspx?BRCHR_VRSN_ID=685226

Conversation Starters - *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?

Principal Fees and Costs: You will see the amount of advisory fees you will pay prior to services being provided. The annual advisory fee for investment advisory services is charged quarterly in arrears and varies depending on the size and composition of your portfolio and the type of services we are providing you. Our fee is based on a percentage of the market value of your account, including cash holdings. Consulting fees also vary, depending upon the scope and complexity of the services and the level of the professional rendering the consulting services. Fees for Family Office Services are customized for each client and may be charged as a monthly fee or included in the advisory fee to clients who have also engaged us for investment advisory services. Fees you pay us for investment advisory services are separate and distinct from other fees and expenses charged to your accounts and investments, such as brokerage, custodial, trading, account maintenance, costs of the investment and related fees. The more assets there are in your advisory account, the more you will pay in fees, and we may therefore have an incentive to encourage you to increase the assets in your account. 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.

ADDITIONAL INFORMATION: For more information, please visit and see Items 5-6 & 12 in Form ADV, Part 2A, available at: https://files.adviserinfo.sec.gov/IAPD/Content/Common/crd_iapd_Brochure.aspx?BRCHR_VRSN_ID=685226

Conversation Starter - "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?"

Standard of Conduct/Conflicts of Interest

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 must act in your best interest and not put our interests 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 had certain investors (including some clients) take equity positions in our Firm. This sale of interests in our Firm to clients could present a conflict of interest because we may have an incentive to treat client investors preferentially. Additionally, our firm recommends Charles Schwab & Co. as custodian of your assets. We receive some economic benefits from Charles Schwab & Co. in the form of the support products and services made available to us and other independent investment advisors that have their clients maintain accounts at Charles Schwab & Co. In light of our arrangements with this custodian, a conflict of interest exists between our interests and yours because we have incentive to recommend this custodian based on the benefits we receive.

We are fiduciaries to you. That means we are required to act in your best interest throughout our entire advisory relationship.

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

ADDITIONAL INFORMATION: For more information on conflicts of interest, see Items 4, 9, 10, 11, 12 and 14 of our Form ADV, Part 2, available at: https://files.adviserinfo.sec.gov/IAPD/Content/Common/crd_iapd_Brochure.aspx?BRCHR_VRSN_ID=625169

How do your financial professionals make money?

Our financial professionals receive a salary and distributions based on the profitability of the firm. Certain partners of the firm receive only distributions.

Item 4: Disciplinary History

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

No. For more information, please refer to Form ADV, Part 2A, Item 9 available at:

https://files.adviserinfo.sec.gov/IAPD/Content/Common/crd_iapd_Brochure.aspx?BRCHR_VRSN_ID=685226 or you can visit [Investor.gov/CRS](https://www.investor.gov/CRS) for free and simple search tool to research us and our financial professionals.

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

Item 5: Additional Information

If you have any questions about our investment advisory services or if you wish to request a copy of the relationship summary, please contact us at sm@curatedwealthpartners.com. Additional information about us is also available on the SEC's website at <https://www.investor.gov/CRS>. You can also call us at (310) 356-0830 for up-to-date information and request a copy of the relationship summary.

Conversation Starter – 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 his person is treating me?