



CUSTOMER RELATIONSHIP SUMMARY (FORM CRS)

INTRODUCTION

Cordant Wealth Partners is registered with the Securities and Exchange Commission (SEC) as a Registered Investment Advisor. 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, which also provides educational materials about broker-dealers, investment advisers, and investing.

WHAT INVESTMENT SERVICES AND ADVICE CAN YOU PROVIDE ME?

Cordant provides financial planning services to individuals and families as part of our comprehensive wealth management services which includes advice in the following areas: Financial Clarity; Income, Cash Flow, and Retirement Planning; Investment Management; Estate, Legacy, and Charitable Planning; Tax Planning and Risk Management. We monitor clients' portfolios and manage them on a discretionary basis. We charge based on assets under management but in circumstances where a client's investable balance is less than \$500,000 a minimum fee of \$6,250 is charged.

For additional information, please see our [Firm Brochure](#).

You may want 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 these qualifications mean?**

WHAT FEES WILL I PAY?

Investment Advisory Fees are paid quarterly in advance pursuant to the terms of the Investment Advisory Agreement and are based on the market value of assets under management at the end of each calendar quarter. Our tiered fee schedule ranges from .50% to 1.25% and is subject to a \$500,000 minimum account size or \$6,250 per year minimum account fee. Unless otherwise noted, with most client relationships, the financial planning fee is built into the investment advisory fee that is billed. You will also pay fees for custodial services, account maintenance fees, and other fees associated with maintaining your account. We do not share in any portion of these fees. Clients may incur certain fees or charges imposed by third parties, other than Cordant, in connection with investments made on behalf of the Client's account[s]. Examples include the expense ratio of mutual funds and ETFs, subadvisory fees to third-party investment managers, and trading commissions to custodians. You are responsible for such charges, fees, and expenses which are exclusive of and in addition to our fee.

You will pay fees and costs whether you make or lose money on your investments. Fees and costs always reduce the 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 our [Firm Brochure](#) and your Investment Advisory Agreement.

You may want to ask us:

- **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?**



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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 interest ahead of yours. At the same time, the way we make money creates some conflicts of interest with your interests. You should understand and ask us about these conflicts because they affect the investment advice we provide you. Here are some examples to help you understand what this means:

- We use Charles Schwab as custodian for our clients. Schwab's services include research, brokerage, custody, and access to mutual funds and other investments that are otherwise available only to institutional investors. Some of these other products and services assist us in managing and administering clients' accounts. To the extent that Charles Schwab provides us products and services that don't directly benefit you, this creates an incentive to recommend them. To learn how we address this incentive, please refer to [Item 12 of our Firm Brochure](#).

You may want 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 on a combination of salary and the potential for additional compensation based on firm profitability. They are not compensated based on product sales or commissions.

DO YOUR FINANCIAL PROFESSIONALS HAVE LEGAL OR DISCIPLINARY HISTORY?

No, neither our firm nor our financial professionals have any legal or disciplinary history. Free and simple tools are available to research firms and financial professionals at Investor.gov/CRS, which also provides educational materials about broker-dealers, investment advisers, and, investing.

You may want 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 <http://www.adviserinfo.sec.gov/> by clicking on the FIRM tab and then searching CRD#152395. You may also contact our firm at 503-621-9207 to request a copy of this relationship summary and other up-to-date information.

You may want 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?**

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