# Form CRS - Customer Relationship Summary

Date: June 27, 2020

Name: Tigris Consulting, LLC

Registered with the Securities and Exchange Commission as an Investment Advisor

### Introduction

Brokerage and investment advisory services and fees differ, and it is important you understand those differences. Free and simple tools are available to research firms and financial professionals at <a href="https://www.investor.gov/CRS">www.investor.gov/CRS</a>, which also provides educational materials about broker-dealers, investment advisors, and investing.

## What investment services and advice can you provide me?

We are a Registered Investment Advisor (RIA) and in that capacity you should expect us to manage a portfolio of securities. Once you become a client, you will be asked to sign an investment advisory contract. Depending on which service you select, our asset allocation services are either "nondiscretionary" (we recommend investments to you, and you make the ultimate decision regarding the purchase or sale of investments) or "discretionary" (we make the ultimate investment decisions without your signoff). Available investments may include mutual funds, exchange-listed equity securities, commingled funds, individual stocks and exchange traded commodity funds.

For the discretionary type of contract, we'll ask you to answer the investor profile questionnaire to understand your investment time horizon and risk tolerance. Based on what we learn from the questionnaire, we'll recommend a portfolio of investment that is monitored at least quarterly.

We are a fee-only advisor, not a broker-dealer, financial planner nor are we involved with wrap free programs. There is an account minimum of \$10,000 for non-retirement brokerage accounts, which may be reduced by Tigris Consulting in its discretion, and \$250 for IRA accounts. The funds will have to be deposited into a qualified custodians; Interactive Brokers LLC and Capital Group (American Funds) are our preferred custodians, please see Item 12: Brokerage Practices from our Form ADV Part 2A Brochure , which is available online at <a href="https://adviserinfo.sec.gov/firm/summary/284070">https://adviserinfo.sec.gov/firm/summary/284070</a>

## What fees will I pay?

You should expect to pay a fee for investment advisory services every quarter. You agree to this fee when you sign your investment advisory contract. We charge fixed rate of 1.8% annually from the total assets under our management which is the value of the investments in your account. These fees are generally negotiable and the final fee schedule is attached as exhibit of the investment advisory contract. Your fee will be automatically deducted from your custodial account following the end of each calendar quarter. This fee is in addition to any other fees that may be incurred, including ETF fees, mutual fund fees, transactions and other fees that are not charged by us.

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 about our fees is in Item 5 of our Firm Brochure, which is available online at <a href="https://adviserinfo.sec.gov/firm/summary/284070">https://adviserinfo.sec.gov/firm/summary/284070</a>

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:

As a fee-only adviser, a conflict of interest may exist any time we recommend that you keep your assets under our management rather than remove your assets from our management. Examples could include recommending that you rollover an account into an account managed by our firm, or recommending that your assets remain in your account rather than satisfying a debt obligation.

Our firm receives support services from our custodians that could include investment-related research, pricing information and market data, software and other technology that provide access to your account data, compliance and/or practice management-related publications, meetings, and other educational and/or social events, marketing support. You should be aware, however, that the receipt of economic benefit by our firm or its related persons in and of itself creates a potential conflict of interest and may indirectly influence our choice of custodian for custody and brokerage services.

Additional information about our conflicts of interest is in Item 10 of our Firm Brochure, which is available online at <a href="https://adviserinfo.sec.gov/firm/summary/284070">https://adviserinfo.sec.gov/firm/summary/284070</a>

# How do your financial professionals make money?

Our financial professionals are paid based only on the revenue our firm earns from advisory services.

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

No, our firm and financial professionals do not have any legal and disciplinary history to disclose. Visit <a href="www.investor.gov/CRS">www.investor.gov/CRS</a> for a free and simple search tool to research our firm and our financial professionals.

### **Additional information**

You can find additional information about our firm's investment advisory services on the SEC's website at www.adviserinfo.sec.gov by searching the firm CRD #284070. You may also contact our firm at 940-600-4222 to request a copy of this relationship summary and other up-to-date information.

[Include the following questions:]

#### **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?
- 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?
- How might your conflicts of interest affect me, and how will you address them?
- As a financial professional, do you have any disciplinary history?
- For what of investments do you offer?
- 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?