Geneva Partners
ASSET MANAGEMENT

June 22, 2020

Form CRS – Geneva Partners, LLC

Geneva Partners, LLC is registered with the Securities and Exchange Commission as an Investment Adviser. Brokerage and investment advisory services and fees differ, and it is important for you to understand the difference. Free and simple tools are available to you to research firms and financial professionals at *www.investor.gov/CRS*, which also provides educational materials about broker-dealers, investment advisers, and investing.

What investment services and advice can you provide me?

We provide investment advisory services to retail investors. Our investment management services include financial planning and management of your assets through the use of various investment vehicles. Our financial planning services assist in developing a client's portfolio by assessing their long-term objectives. We analyze cash flow needs, income tax liabilities and retirement goals during this process. We personalize your investment strategy to your financial situation. There are no limitations on those services, such as length of time. We monitor your investments continuously and make changes when appropriate. This monitoring occurs upon material changes in economic conditions, new tax laws or with changes in your personal financial situation, and is part of our standard investment management services. Generally, we act with discretionary authority as a portfolio manager which allows us to purchase and sell securities without seeking your permission prior to trade. We are not limited in trading except by your known, identified restrictions. We have an account minimum of $100,000. *For an additional description of our services, please see our website at www.genevapartnersllc.com or our Form ADV, Part2A, Items 4, 13 and 16 at https://static.fmgsuite.com/media/documents/3d035b18-b74e-492b-8788-284b9a3845fa.pdf.*

Questions for 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?

We charge an asset-based fee for our investment management service, quarterly in advance, based upon the value of your portfolio as of the last day of the previous quarter. An asset-based fee means that if the value of your portfolio increases, our fee increases. Therefore, it is an incentive for us to encourage you to add assets to your account. Fees for our financial planning services are included in the asset management fee. In addition to our fees, you may pay custodian fees, account maintenance fees, transaction costs such as commissions, mutual fund ticket charges, and underlying mutual fund expenses and mutual fund managers' fees. We do not participate in any of these fees.

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 our ADV, Part2A, Item 5 at *https://static.fmgsuite.com/media/documents/3d035b18-b74e-492b-8788-284b9a3845fa.pdf*

Question 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?

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 (asset-based fees) creates some conflicts with your interest. You should understand and ask us about these conflicts because they can affect the investment advice, we provide to you. Here is an example to help you understand what this means**.**

Some of our representatives are also licensed as insurance brokers and as a result of their registration, they receive usual and ordinary commissions on insurance products, some of which may be offered to our clients. This creates a conflict because these representatives may be inclined to favor those clients who have purchased insurance products, or the activity will take them away from advisory services. *For additional information, please see our ADV, Part2A, Item 10 and Item 14 at* *https://static.fmgsuite.com/media/documents/3d035b18-b74e-492b-8788-284b9a3845fa.pdf.*

Question 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 by salaries and a contractual split of the advisory fees earned by us. Generally, our representatives will earn fees from the clients they have recruited to us. In addition, our financial professionals may also make money by the sale of insurance products. These conflicts are disclosed above and in our *ADV, Part2A, Item 14 at* *https://static.fmgsuite.com/media/documents/086bc1e8-dab5-41d6-8651-e48bbc46fe2a.pdf*

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

No, neither our firm nor any of our associated persons has any disciplinary or legal history. You may go to *www.Investor.gov/CRS* for a free and simple search tool to research us and our financial professionals.

Additional Information

You may obtain additional information by viewing our website at *www.genevapartnersllc.com* or reviewing our ADV, Part1A and Part2A *at https://adviserinfo.sec.gov/firm/summary/130768*. You can request up-to-date information about our firm and request a copy of our relationship summary by calling 262-248-1350. The Form CRS is also posted to our website.

Question to Ask Us:
***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 this person is treating me*?**