

Savoie Capital, LLC
Form CRS Customer Relationship Summary
3/3/2021

Firm Overview:

We are an investment adviser registered with the Securities and Exchange Commission (SEC). Brokerage and investment advisory services and fees differ, and it is important for you to understand these differences. Free and simple tools are available to research firms and financial professionals at [Investor.gov/CRS](https://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 are an investment advisory firm that provides asset management for retail and institutional investors. We tailor our advisory services in respect to your investment objectives, restrictions, and guidelines. We will discuss your investment goals and design with you a strategy to achieve your goals. Your account will be monitored on an ongoing basis, and we will discuss with you any changes that can be made based on market conditions or your individual circumstances.

There are multiple trading strategies that we use and can be tailored to your needs. We can offer advice on any of our strategies, or investment advice in general. Our investment strategies focus on active trading of equity and equity-related securities, exchange traded funds ("ETFs"), futures contracts and options on futures contracts, as well as listed and over-the-counter options and other derivative instruments.

All investors can choose between discretionary and non-discretionary accounts. In a discretionary account, a portfolio manager trades the assets in your account on your behalf. In a non-discretionary account, we can provide you with investment advice, but you make all decisions about the purchases and sales of all securities.

You may need to meet account minimums for some of our investment advisory programs. New accounts are generally subject to a \$25,000,000 investment, but other minimums may be discussed based on your needs.

Please ask us for our Form ADV Part 2A Brochure at any time for complete details about our services and fees.

[Conversation Starter: Ask Your Financial Professional](#)

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?

Fees for investment advisory services are charged at the end of each quarter, based on the market value of the assets in your account on the last day of the quarter. There are limited situations in which you may be able to arrange a performance fee-based service with us. The standard fee schedule is found in our Disclosure Brochure. Fees are subject to negotiation. Your fee may vary from the standard schedules to reflect circumstances that apply to your specific account. The specific fee schedule and terms that apply to your account are stated in your investment advisory agreement.

The types of fees we receive may create a conflict of interest. Asset-based fees incentivize us to encourage you to add more assets to your account. You will also incur other fees directly or indirectly. These may include but are not limited to custodian fees, account maintenance fees, mutual fund expenses, transaction costs, trade-away fees, account transfer fees, wire transfer fees, interest, and taxes. 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 Form ADV, part 2A brochure.

[Conversation Starter: Ask Your Financial Professional](#)

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 services will I receive for those fees?

What additional cost should I expect in connection with my advisory account?

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.

We could recommend that you transfer an account to a custodian that you do not presently use. Some custodians that we may recommend typically include certain services as part of our relationship which can assist us in operating our business. Types of services could include market data, technology, and compliance management. We could also recommend that you transfer funds from your current account into an account that is part of a specific trading strategy utilized by the Firm.

We do not receive third-party payments, we have no revenue sharing agreements, and we do not participate in any principal trading.

[Conversation Starter: Ask Your Financial Professional](#)

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

How do your financial professionals make money?

Our financial professionals receive compensation based on salary, bonus, and profits of the Firm.

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

No. None of our financial professionals have ever had any legal or disciplinary history.

Visit Investor.gov/CRS for a free and simple search tool to research us and our financial professionals.

[Conversation Starter: Ask Your Financial Professional](#)

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

Additional Information

For additional information about our services, please visit our website at www.savoiecapital.com.

If you would like additional, up-to-date information or a copy of this disclosure, please call (312) 573-9043 or email us at info@savoiecapital.com.

[Conversation Starter: Ask Your Financial Professional](#)

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?