



**Part 3 of Form ADV / Form CRS  
Meyer Capital Management  
March 31, 2023**

Meyer Capital Management, LLC (MCM) is an investment advisory and financial planning services firm registered with the Securities and Exchange Commission (SEC) as an investment advisor. MCM does not provide brokerage services. Brokerage and investment advisory services and fees differ, and it is important for you, as a retail investor, to understand the differences. Free and simple tools are available to research firms and financial professionals at [www.investor.gov/CRS](http://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?**

MCM provides investment advisory and financial planning services to retail investors. Continuous monitoring (i.e., daily) of your account(s) is an integral part of our investment advisory services. Investment advisory services are provided on a discretionary basis as authorized by you in writing in the Investment Management Agreement. This authority remains in effect for the duration of the agreement. Our investment advice is not limited to proprietary products, a limited menu of products, or selected types of investments.

MCM's *Growing Investor Program* requires a minimum investment of \$1,000. The minimum investment for the *Custom Portfolio Program* is \$250,000.

**For additional information** please review

[MCM Form ADV](http://meyercapital.com/wp-content/uploads/2023/03/MCM-Form-ADV-Part-2-Brochure-03-31-23.pdf) (<http://meyercapital.com/wp-content/uploads/2023/03/MCM-Form-ADV-Part-2-Brochure-03-31-23.pdf>)

Below are some questions you can use to start a conversation with a financial professional regarding relationships and services:

- ✓ 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?**

MCM is a fee-only investment advisor. Investment advisory clients pay an asset-based fee calculated as a percentage of your assets under our management. The more assets there are in your account, the more you will pay in fees. This may incent us to encourage you to increase the assets in your account(s). We do not impose or accept compensation for trading, brokering securities or any other investment activity, including the distribution and sale of mutual funds, structured insurance products (e.g., annuities), etc. MCM does not participate in any wrap fee programs.

Financial planning clients pay a fixed fee-for-service based on the terms of the engagement.

You may incur additional non-MCM fees for custodial services, mutual funds, exchange traded funds, transaction-related expenses (e.g., trade away), etc.

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.

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Below is a question you can use to start a conversation with a financial professional regarding the impact of fees and costs on investments:

- ✓ 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 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.*

Asset-based management fees: This may incent us to encourage you to maintain and/or increase the assets in your account(s).

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Below is a question you can use to start a conversation with a financial professional regarding conflicts of interest:

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

## **How do your financial professionals make money?**

MCM's financial professionals are salaried employees compensated based on their experience and expertise. Their cash compensation is not based on the amount of client assets they service, the time and complexity required to meet a client's needs, or product sales commissions. All MCM employees are eligible to participate in a 401(k) Profit Sharing Retirement Plan. MCM professionals do not receive non-cash compensation.

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

No. Neither Meyer Capital Management, nor any of its employees, is or has been the subject of any criminal, civil, or regulatory proceeding.

**For additional information** please review

[www.investor.gov/CRS](http://www.investor.gov/CRS) for a free and simple tool to research the financial professionals at Meyer Capital Management  
[MCM Form ADV](http://meyercapital.com/wp-content/uploads/2023/03/MCM-Form-ADV-Part-2-Brochure-03-31-23.pdf) (<http://meyercapital.com/wp-content/uploads/2023/03/MCM-Form-ADV-Part-2-Brochure-03-31-23.pdf>)

Below is a question you can use to start a conversation with a financial professional regarding the financial professional's disciplinary history:

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

## **Additional Information**

For more information about our investment advisory services and to request a copy of this disclosure please

Call 513-772-3600

Email [mcm@meyercapital.com](mailto:mcm@meyercapital.com)

Or visit [www.meyercapital.com](http://www.meyercapital.com)

Below is a question you can use to start a conversation with a financial professional regarding contacts and complaints:

- ✓ 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?