

## TREBUCHET CONSULTING, LLC CUSTOMER RELATIONSHIP SUMMARY

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[Trebuchet Consulting, LLC \(“Trebuchet”\)](http://www.trebuchetconsultingllc.com) ([www.trebuchetconsultingllc.com](http://www.trebuchetconsultingllc.com)) is registered with the [U.S. Securities and Exchange Commission \(“SEC”\)](http://www.sec.gov) ([www.sec.gov](http://www.sec.gov)) as an Investment Adviser. Brokerage and investment advisory services and fees differ. It is important for a retail investor to understand the differences. There are free tools available for investors to research firms and financial professionals at [Investor.gov/CRS](http://Investor.gov/CRS). This site also provides educational materials about broker-dealers, investment advisers, and investing.

### WHAT INVESTMENT SERVICES AND ADVICE CAN YOU PROVIDE ME?

Trebuchet offers investment advisory services to retail investors. These services include asset management and personalized financial counseling solutions to assist clients with a wide range of services including asset accumulation, allocation, preservation, growth and transfer. Our service includes ongoing monitoring of your investment portfolio when you have an Assets Under Management Agreement. These investments include mutual funds, exchange-traded funds (“ETFs”), equities, and fixed income securities. Our Financial Counseling and Hourly services do not include ongoing monitoring. These services include periodic reviews at the client’s request. Trebuchet does not have discretionary authority to invest your account(s). You as the investor make the ultimate decision whether to purchase or sell the securities recommended to you. Trebuchet does not limit its recommendations and investment services to proprietary products or specific types of securities. Trebuchet does not have a minimum account requirement. For more detailed information about our services, refer to our [Form ADV Part 2A Brochure](http://adviserinfo.sec.gov/firm/summary/166645). ([adviserinfo.sec.gov/firm/summary/166645](http://adviserinfo.sec.gov/firm/summary/166645))

### QUESTIONS TO ASK YOUR FINANCIAL PROFESSIONAL

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- *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?

**Description of Principal Fees and Costs:** Trebuchet is compensated for Financial Counseling Services either by negotiated fixed fees or hourly charges. In either case the services and fees are specified in an agreement between you and Trebuchet. Trebuchet negotiates terms of advisory agreements with clients on a case-by-case basis. Fees are determined based on the nature of the services being provided and the complexity of each client’s circumstances. Fees generally range from \$5,000 to \$40,000 annually. Fees are paid in advance or arrears as indicated by the advisory contract and are generally due semi-annually.

Trebuchet is compensated for Asset Management Services based on a fee which is calculated based on the value of their client’s assets on the last business day of the previous quarter. Clients are billed in advance on a quarterly basis and fees can be pro-rated. Clients will be charged at the rate set forth in their Assets Under Management Agreement. AUM fees range from .25 to 1.00 annually.

When you are charged an asset-based fee, the more assets there are in your account, the more you will pay in fees, and Trebuchet therefore has an incentive to encourage you to increase the assets in your account.

**Description of Other Fees and Costs:** All fees paid to Trebuchet are separate and distinct from the fees and expenses that may be charged by other advisors (including separate account managers, mutual funds and/or ETFs), custodians, banks and brokers. Other fees charged to you that are related to your account are fees paid to the custodian and broker, fees related to mutual funds, ETFs, transactional fees and product-level fees.

**Additional Information:** *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.*

The fees for investment advisory services are described in further detail in our firm’s ADV, in particular, Part 2A brochure, Items 5.A., B., C., and D.

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***QUESTIONS TO ASK YOUR FINANCIAL PROFESSIONAL***

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- *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 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 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.*

When you are charged an asset-based fee, the more assets there are in your account, the more you will pay in fees. It will benefit Trebuchet to recommend that clients increase the assets managed by Trebuchet. Trebuchet has entered into a support agreement with their primary custodian, Fidelity. This agreement creates an incentive for Trebuchet to recommend Fidelity to retail investors. Additionally, Trebuchet has employees that are licensed insurance professionals creating an incentive to recommend insurance products to retail investors. For more detailed information regarding conflicts of interest, please see our [Form ADV, Part 2A Brochure](https://adviserinfo.sec.gov/firm/summary/166645). ([adviserinfo.sec.gov/firm/summary/166645](https://adviserinfo.sec.gov/firm/summary/166645))

***QUESTIONS TO ASK YOUR FINANCIAL PROFESSIONAL***

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- *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 paid a salary and other non-cash compensation in the form of an employee benefits package. Our financial professionals can earn a bonus and additional compensation based on exceptional client service, retaining client relationships, developing new client relationships and the financial results of the firm.

The factors which affect how much our financial professionals are paid include: the amount of client assets they service; the revenue received by the firm for financial advisory services conducted by the financial professional; the time and complexity required to meet a particular clients' financial needs and objectives.

**DO YOU OR YOUR FINANCIAL PROFESSIONALS HAVE LEGAL OR DISCIPLINARY HISTORY?**

No, Trebuchet and our financial professionals do not have any legal or disciplinary history to report. Please see [Investor.gov/CRS](https://Investor.gov/CRS) for a free search tool to research Trebuchet and our financial professionals.

***QUESTIONS TO ASK YOUR FINANCIAL PROFESSIONAL***

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- *As a financial professional, do you have any disciplinary history? If so, for what type of conduct?*

**ADDITIONAL INFORMATION**

You can also find additional information about our Firm and your Financial Professional on the SEC's Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](https://www.adviserinfo.sec.gov). Please call us at (412) 388-0715 for up-to-date information about our services or to request a copy of our relationship summary.

***QUESTIONS TO ASK YOUR FINANCIAL PROFESSIONAL***

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- *Who is my primary contact person?*
- *Is he or she a representative of an investment adviser?*
- *Who can I talk to if I have concerns about how this person is treating me?*