

3/26/2024

Client Relationship Summary
Clearview Investment Partners, LLC
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Registered with the Securities and Exchange Commission as an Investment Advisor. There are different ways you can get help with your investments. You should carefully consider which types of accounts and services are right for you. We are an investment adviser and provide advisory accounts and services rather than brokerage accounts and services. This document gives you a summary of the types of services we provide and how you pay. Please ask us for more information. There are some suggested questions on page [2]. Free and simple tools are available to research firms and financial professionals at Investor.gov/CRS, which also provides educational materials about broker-dealers, investment advisers, and investing.

Item 2: Relationships and Services “What investment services and advice can you provide me?” CVIP provides clients with wealth management services which include a broad range of comprehensive financial planning and consulting services as well as discretionary and/or non-discretionary management of investment portfolios. Clients can engage CVIP to manage all or a portion of their assets on a discretionary or non-discretionary basis. As needed, CVIP will develop a comprehensive financial plan and/or provide ongoing financial planning services which may take into consideration business planning, investment, insurance, retirement, education, estate planning, and tax and cash flow needs of the client.

Monitoring: Wealth Management Services: For those clients to whom CVIP provides wealth management services, CVIP monitors those portfolios as part of an ongoing process while regular account reviews are conducted on at least a quarterly basis. Such reviews are conducted by one of CVIP’s investment adviser representatives. All investment advisory clients are encouraged to discuss their needs, goals, and objectives with CVIP and to keep CVIP informed of any changes thereto. CVIP contacts ongoing investment advisory clients at least annually to review its previous services and/or recommendations and to discuss the impact resulting from any changes in the client’s financial situation and/or investment objectives. **Use of Independent Managers:** CVIP renders services to the client relative to the discretionary recommendation or selection of Independent Managers. CVIP also monitors and reviews the account performance and the client’s investment objectives. **Investment Authority:** CVIP is given the authority to exercise discretion on behalf of clients. CVIP is considered to exercise investment discretion over a client’s account if it can effect transactions for the client without first having to seek the client’s consent. CVIP is given this authority through a power-of- attorney included in the agreement between CVIP and the client. Clients may request a limitation on this authority (such as certain securities not to be bought or sold). CVIP takes discretion over the following activities: The securities to be purchased or sold; The amount of securities to be purchased or sold; When transactions are made; and The Independent Managers to be hired or fired. CVIP may also be given non-discretionary authority on a portion of its clients’ accounts. In those cases, the retail investor makes the ultimate decision regarding the purchase or sale of investments. **Limited Investment Offerings:** CVIP does not offer advice only with respect to proprietary products, or a limited menu of products or types of investments. **Account Minimums and Other Requirements:** CVIP generally imposes a minimum portfolio size of \$250,000. CVIP, in its sole discretion, may accept clients with smaller portfolios based upon certain criteria including anticipated future earning capacity, anticipated future additional assets, dollar amount of assets to be managed, related accounts, account composition, pre-existing client, account retention, and pro bono activities. **Additional Information:** Questions to ask your advisor: “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?”

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Item 3: Fees - Description of Principal Fees and Costs: Wealth Management Fees: Equity & Balanced: Up to \$250,000 – 1.25%; \$250,001 - \$500,000 - 1.10%; \$500,001 - \$1,000,000 - 1.00%; \$1,000,001 - \$2,000,000 - 0.85%; \$2,000,001 - \$5,000,000 - 0.65%. Fixed: up to \$250,000 – 1.00%; \$250,001 - \$500,000 - .85%; \$500,001 - \$1,000,000 - .70%; \$1,000,001 - \$2,000,000 - 0.55%; \$2,000,001 - \$5,000,000 - 0.40%; above \$5,000,000 – Negotiable. Managed (Equity & Balanced): up to \$250,000 – .80%; \$250,001 - \$500,000 - .70%; \$500,001 - \$1,000,000 - .60%; \$1,000,001 - \$2,000,000 - .50%; \$2,000,001 - \$5,000,000 - .40%; above \$5,000,000 - .25%. Managed (Fixed Income): up to \$250,000 – .40%; \$250,001 - \$500,000 - .35%; \$500,001 - \$1,000,000 - .30%; \$1,000,001 - \$2,000,000 - .20%; above \$2,000,000 - .10%.

A conflict of interest exists to the extent that CVIP or its Supervised Persons recommend the purchase of insurance products where CVIP or its Supervised Persons receive insurance commissions or other additional compensation. CVIP does not receive compensation in connection with the purchase or sale of securities. **Description of Other Fees and Costs:** In addition to CVIP's fees, clients incur certain charges imposed by the Financial Institutions, custodians, and other third parties such as fees charged by Independent Managers (as defined below), custodial fees, charges imposed directly by a mutual fund or ETF in the account, which are disclosed in the fund's prospectus (e.g., fund management fees and other fund expenses), margin costs, reporting charges, fees related to alternative investments, deferred sales charges, odd-lot differentials, transfer taxes, wire transfer and electronic fund fees, and other fees and taxes on brokerage accounts and securities transactions. 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."

Question to Ask Advisor? "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?" **Disclaimer:** 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." **Question to ask advisor?** "How might your conflicts of interest affect me, and how will you address them?" "How do your financial professionals make money?" Description of How Financial Professionals Make Money: Please review a summary of our services and fees above.

Item 4 – Disciplinary History: "Do you or your financial professionals have legal or disciplinary history?" **No.** Please visit <https://Investor.gov/CRS> for a free and simple search tool to research you and your financial professionals. Questions to Ask Advisor: "As a financial professional, do you have any disciplinary history? For what type of conduct?"

Item 5 – Additional Information: This *Client Relationship Summary* ("Form CRS/ADV Part 3") brochure provides information about the qualifications and business practices of Clearview Investment Partners. If you have any questions about the contents of this brochure, please contact us at 949-200-1560 if you would like to receive up-to-date information about our advisory service and/or to request the latest copy of this summary. The information in this brochure has not been approved or verified by the United States Securities and Exchange Commission or by any state securities authority. Registration with the Securities and Exchange Commission ("SEC") does not imply a certain level of skill or training. Additional information about [your name] also is available on the SEC's website at www.adviserinfo.sec.gov.

Questions to Ask Advisor: "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?"