

**deMAURIAC LLC**  
**CLIENT RELATIONSHIP SUMMARY**  
**v. Feb 2021**

**This is the Client Relationship Summary for deMAURIAC LLC- a Registered Investment Adviser with registered office location in Louisiana.**

Free and simple tools are available to you to research firms and financial professionals at [Investor.gov/CRS](https://investor.gov/CRS), which also provides educational materials about broker-dealers, investment advisers, and investing.

**What investment services and advice can you provide me?**

The investment advisory services we provide include: a comprehensive service combining financial planning and portfolio management, stand alone financial planning services, as well as a robo-advisory investment platform. Our comprehensive management service provides continuous monitoring of your investments. If you choose to receive only our financial planning service without ongoing portfolio management, we will not monitor your investments daily.

**Ask us:** How will you choose investments to recommend to me? What is your relevant experience, including your licenses, education and other qualifications?

**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. At the same time, the way we make money creates some conflicts. Here are some examples to help you understand what this means: While deMAURIAC works to minimize conflicts with clients, simply setting a fee for our services creates a conflict.

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

**What about cost?**

We charge a percentage of assets under management for our comprehensive service. You may also incur other fees including custodian fees, trade ticket charges, or banking fees in connection with an investment account and the securities in the account, depending on your situation. deMAURIAC LLC does not receive any of these fees. Please make sure you understand what fees and costs you are paying.

**Ask us:** Help me understand how cost might affect my investments.

**Do you or your financial professionals have legal or disciplinary history?** No; however, [Investor.gov/CRS](https://investor.gov/CRS) has a free and simple search tool that allows you to research your financial professionals.

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

**For more information, please review our ADV disclosure brochure. You can contact [Marigny@deMauriac.com](mailto:Marigny@deMauriac.com), if you have any additional questions.**